Reporting User Guide

Version 1.2

December 2001

bmcsoftware

Contacting BMC Software

You can access the BMC Software Web site at **http://www.bmc.com**. From this Web site, you can obtain general information about the company, its products, special events, and career opportunities. For a complete list of all BMC Software offices and locations, go to **http://www.bmc.com/corporate/offices.html**.

USA and Canada

Address BMC Software, Inc.
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Customer Support

You can obtain technical support by using the Support page on the BMC Software Web site or by contacting Customer Support by telephone or e-mail. To expedite your inquiry, please see "Before Contacting BMC Software," below.

Support Web Site

You can obtain technical support from BMC Software 24 hours a day, seven days a week by accessing the technical support Web site at **http://www.bmc.com/support.html**. From this site, you can

- read overviews about support services and programs that BMC Software offers
- find the most current information about BMC Software products
- search a database for problems similar to yours and possible solutions
- order or download product documentation
- report a problem or ask a question
- subscribe to receive e-mail notices when new product versions are released
- find worldwide BMC Software support center locations and contact information, including e-mail addresses, fax numbers, and telephone numbers

Support via Telephone or E-mail

In the USA and Canada, if you need technical support and do not have access to the Web, call 800 537 1813. Outside the USA and Canada, please contact your local support center for assistance. To find telephone and e-mail contact information for the BMC Software support center that services your location, refer to the Contact Customer Support section of the Support page on the BMC Software Web site at **www.bmc.com/support.html**.

Before Contacting BMC Software

Before you contact BMC Software, have the following information available so that a technical support analyst can begin working on your problem immediately:

- product information
  - product name
  - product version (release number)
  - license number and password (trial or permanent)
- operating-system and environment information
  - machine type
  - operating system type, version, and service pack or program temporary fix (PTF)
  - system hardware configuration
  - serial numbers
  - related software (database, application, and communication) including type, version, and service pack or PTF

- sequence of events leading to the problem
- commands and options that you used
- messages received (and the time and date that you received them)
  - product error messages
  - messages from the operating system, such as `file system full`
  - messages from related software

Contents

About This Book

This book contains detailed information about the reporting side of Service Reporting, and is intended for anyone who creates, views, or distributes reports for the management of enterprise resources.

Note

This book assumes that you are familiar with your host operating system. You should know how to perform basic actions in a Windows environment, such as choosing menu commands and dragging and dropping icons.

Related Documentation

BMC Software products offer several types of documentation:

- online and printed books
- online Help
- release notes

In addition to this book and the online Help, you can find useful information in the publications listed in the following table. As "Actuate Software Corporation Documentation" on page xi explains, these publications are available on request from BMC Software.

Category	Document	Description
Installation documents	*Service Reporting Getting Started Guide*	contains the installation and basic configuration instructions for Service Reporting
Core documentation	*DataStore Administrator Guide*	provides instructions for using DataStore and the DataStore Console
	Reporting User Guide	provides instructions for creating, analyzing, viewing, and distributing enterprise-wide reports
Supplemental documentation	*Service Reporting DataStore Schema*	contains details about the DataStore schema for use with the Reporting Studio
Release Notes	*Service Reporting Release Notes*	contain the latest updates to Service Reporting products

BMC Software also provides documentation for the Actuate Software Corporation components of Service Reporting.

Actuate Software Corporation Documentation

Document	Description	File Name	Size
Actuate e.Reporting Suite 4 Release Notes	describes new features, identifies known limitations, and lists customer-reported defects that have been fixed	readme.pdf	51 KB
Administering the Report Encyclopedia	provides information about managing users, groups, roles, privileges, printers, process groups, and print requests	admin-report-encycolpedia.pdf	2,744 KB
Using e.Reports	describes the tasks you can perform with reports that have been designed, compiled, and generated—includes using e.reports on the Web or a desktop, viewing and running a report, searching for and exporting data, printing and distributing a report	using-ereports.pdf	4,331 KB
Viewing e.Reports	describes the tasks you can perform using the Actuate Viewer—includes the same topics as *Using e.Reports* except for running a report	viewing-ereports.pdf	3,791 KB
LRX for Microsoft Internet Explorer	describes the tasks you can perform using Microsoft Internet Explorer in combination with the Actuate LRX	lrx-microsoft.pdf	3,153 KB
LRX for Netscape Navigator	describes the tasks you can perform using Netscape Navigator in combination with the Actuate LRX	lrx-netscape.pdf	3,163 KB

Document	Description	File Name	Size
Building an e.Reporting Web Site	provides information on accessing the Actuate Report Encyclopedia on the World Wide Web	Building an e.Reporting Web Site.pdf	3,456 KB
e.Reporting Server Guide	provides information about managing the interaction between client and server to enable activities such as scheduling and running reports	ereporting-server.pdf	2,548 KB
Developing Advanced e.Reports	provides information about creating your own reports using the Reporting Studio	Developing Advanced e.Reports.pdf	9,805 KB

Online and Printed Books

The books that accompany BMC Software products are available in online and printed formats. You can view online books with Acrobat Reader from Adobe Systems. The reader is provided at no cost, as explained in "To Access Online Books." You can also obtain additional printed books from BMC Software, as explained in "To Request Additional Printed Books."

To Access Online Books

Online books are formatted as Portable Document Format (PDF) files. You can view them, print them, or copy them to your computer by using Acrobat Reader 3.0 or later. You can access online books from the documentation compact disc (CD) that accompanies your product or from the World Wide Web.

In some cases, installation of Acrobat Reader and downloading the online books is an optional part of the product-installation process. For information about downloading the free reader from the Web, go to the Adobe Systems site at **http://www.adobe.com**.

To view any online book that BMC Software offers, visit the support page of the BMC Software Web site at **http://www.bmc.com/support.html**. Log on and select a product to access the related documentation. (To log on, first-time users can request a user name and password by registering at the support page or by contacting a BMC Software sales representative.)

To Request Additional Printed Books

BMC Software provides a core set of printed books with your product order. To request additional books, go to **http://www.bmc.com/support.html.**

Online Help

You can access Help for a product through the product's Help menu. The online Help provides information about the product's graphical user interface (GUI) and provides instructions for completing tasks.

Release Notes

Printed release notes accompany each BMC Software product. Release notes provide up-to-date information such as

- summary of new features
- updates to the installation instructions
- last-minute product information
- listing of the related documentation

The latest versions of the release notes are also available on the Web at **http://www.bmc.com/support.html**.

Conventions

The following conventions are used in this book:

- This book includes special elements called *notes*, *warnings*, *examples*, *tips*, and *see online help*:

Note

Notes provide additional information about the current subject.

Warning

Warnings alert you to situations that can cause problems, such as loss of data, if you do not follow instructions carefully.

Example

An example clarifies a concept discussed in text.

Tip

A tip provides useful information that may improve product performance or make procedures easier to follow.

Directs you to product Online Help for information to supplement the printed documentation.

- The symbol => connects items in a menu sequence. For example, **Actions => Create Test** instructs you to choose the Create Test command from the Actions menu.

Introducing Reporting

This chapter provides information on using the reporting components of Service Reporting, and describes how the reporting components relate to the other components of the Service Reporting product.

Overview

Reporting is the part of Service Reporting that provides report creation and viewing facilities. The Service Reporting system allows users to generate, view, distribute, and manage reports.

Service Reporting’s report creation and viewing tool provides predefined (Solution Reports) and user-defined (QuickReports) reports. You can use any combination of Solution Reports or QuickReports to look at information from different points of view.

Key features and benefits of Service Reporting include:

- A common Web application for viewing and managing reports
- Quick and Advanced Search Facilities for locating reports in the Web browser
- An enterprise-scale perspective of systems management
- Easy report creation
- Report scheduling options for proactive, exception-based management
- Quick identification of problem sources through summary and detailed information
- Easy access to system management information through the Web
- Enhanced system management productivity through broad-based exception reporting
- Diagnosis of complex problems through historical insight on similar problems and related symptoms

Checking Reporting System Components

The reporting system is based on a Report Server, which generates reports using data from the DataStore, and communicates with clients for report viewing. Reporting consists of components developed by BMC Software and Actuate Software Corporation.

BMC Software components:

- Reporting Portal (common Web application)
- Publisher Server
- QuickReport Editor (user-customizable report templates)
- Solution Reports (predefined reports)

Actuate Software Corporation components:

- Report Server
- Report Store
- Report viewers

Reporting Portal

You can find and view Visualizer–generated graphs and reports using a common Web application called the Reporting Portal. You can use the Reporting Portal, a component of Service Reporting, through an ordinary Web browser.

To access the Reporting Portal, you need one of the following Web browsers:

- Microsoft Internet Explorer, version 5.0 or later
- Netscape Navigator, version 4.0 or later

QuickReport Editor

The QuickReport Editor is part of a Web-based graphical user interface (GUI) you use to create custom report and report templates from pre-defined templates. The QuickReport Editor comes with 10 different style report templates you can use to create custom report and report templates using specific PATROL parameters and events. You copy and modify the pre-defined templates to create and schedule customized report templates and reports. You can also delete the reports.

Solution Reports

Solution Reports are predefined reports created for the management of a specific technology or application. These reports require little or no user setup. Solution Reports might provide information on service management, enterprise resource management, or on other requirements specific to the management of a particular application or technology.

These reports consist of a set of pre-defined reports for specific operating systems and applications. The following operating system (OS) report packages, are shipped as part of Service Reporting:

- Solution Reports for Microsoft Windows 2000 Server - used to view Windows 2000 and Windows NT measurements across your enterprise

- Solution Reports for Unix - used to view Unix measurements across your enterprise

Other application-specific Solution Reports are available as optional packages, including:

- Solution Reports for Lotus Domino
- Solution Reports for Microsoft Exchange 2000 Server
- Solution Reports for Microsoft Exchange Server
- Solution Reports for Oracle

Service Reporting Studio

The Service Reporting Studio is the report customizing component of Service Reporting. Using the Actuate documentation along with the *Service Reporting DataStore Schema*, you can use the Studio to design your own reports.

Warning

BMC Software distributes the Service Reporting Studio on the Service Reporting product CDs as the customizing component. This customizing environment is licensed *only* through the purchase of PATROL for Service Level Management.

Contact your sales representative for help implementing the customized solutions that the Reporting Studio provides. Your sales representative can tell you what support services your contract provides, for example, support from our professional services organization.

Report Server

The Report Server is the central point for creating and managing reports. From the Report Server, you can:

- generate on-demand or scheduled reports
- print reports
- manage report documents and folders
- manage users and roles
- validate users and requests for on-demand reports with run-time parameters

The Actuate Administrator Desktop is the interface for managing report server users and reports. For information on using the Actuate Administrator Desktop, refer to the Actuate documentation.

Report Store

The Report Store is an online storage area for Actuate information that relates to reporting. Information in the Report Store is organized into the following directories:

- administrative directory - stores users, roles, and privileges information
- requests and scheduling directory - contains active and scheduled requests for report generation
- report item directory - includes report templates, executables, parameters, and generated reports

You can access a Report Store remotely by using a Web-based graphical user interface (GUI), the Web Desktop. For information on how to access and move through the Report Store, see "Accessing the Report Encyclopedia" on page 2-5 and "Navigating the Report Encyclopedia with the Web Desktop" on page 2-11.

Report Viewers

You can review reports using several applications. BMC Software recommends you use the Reporting Portal, a common Web application that run in a Web browser, to locate and view generated reports. For more information on the Reporting Portal, see Chapter 3, "Introducing the Reporting Portal."

With the Web Desktop Web browser, you can generate, schedule, view, and print reports from the Report Encyclopedia. You access the Report Encyclopedia remotely by entering a URL in a Web browser on a supported system. For information on how to access reports through the Web and navigate the Report Encyclopedia, see "Using the Report Encyclopedia" on page 2-6.

You can also use the following Windows application to view reports:

- Actuate Administrator Desktop—use to schedule report generation, for local report viewing, and for local printing

- Reporting Studio— use to create your own unique reports

For information on the Actuate Windows applications, refer to *Viewing e.Reports*, *Using e.Reports*, or the respective application’s online help.

Looking at the Integrated Application

The Service Reporting application provides the components needed to:

- collect data
- summarize data
- store data
- create reports using the stored and summarized data
- store reports and report templates
- manage stored reports
- generate reports on demand and on a scheduled basis
- view reports

The following sections show how the major components of Service Reporting work together to provide an environment to enhance your enterprise reporting capabilities.

Providing the Data for Reporting

Effective reporting depends on the collection and availability of pertinent information in an appropriate format. Service Reporting is an integrated product that not only provides the means to create, view and distribute data, but also includes components for data collection and storage.

- Retrievers and aggregators are responsible for collecting data and summarizing data into the database.

- DataStore provides the database to store the collected data.

See the *DataStore Administrator Guide* for more information on collectors, aggregators, and DataStore.

Understanding Basic Reporting Concepts

This section reviews basic concepts and terminology relating to the reporting piece of Service Reporting.

Reports

Reports are generated presentations (graphs, tables, or charts) based on stored PATROL event and parameter data that you can view remotely using a Web browser on supported platforms.

QuickReports

QuickReports are reports created from user-defined templates. The reports (graph, table, or chart) are created when you specify parameters, selection criteria, labels, and scheduling options using the QuickReport Editor.

Solution Reports

Solution Reports are packages of reports created for the management of a particular technology or application. The Solution Reports require little or no user setup.

Report Templates

Report templates are definitions for Service Reporting that direct the extraction of data from the DataStore for a given time span and generate a presentation in the form of a graph, table, or chart.

2

Introducing the Reporting Tools

This chapter describes the reporting tools that you use to create, schedule, view, and print reports.

Overview

Service Reporting lets you create, schedule, view, and print reports, as well as manage report users and report storage. BMC Software provides several tools to accomplish many of these reporting tasks depending on your requirements. Will you create reports? Are you interested in viewing and printing reports? Will you manage report storage?

Table 2-1 Overview of Reporting Tasks and Tools

Task	Tools to Use
creating a report template	QuickReport Editor
modifying a report template	QuickReport Editor
scheduling a report to run now	QuickReport Editor Web Desktop Actuate Administrator Desktop
scheduling a report to run once or at specific times.	QuickReport Editor Web Desktop Actuate Administrator Desktop
viewing a report	Reporting Portal Web Desktop Actuate Administrator Desktop
printing a report	Reporting Portal Web Desktop Actuate Administrator Desktop
setting up privileges to view reports	Actuate Administrator Desktop

Understanding Reporting Tools

Service Reporting tools includes applications developed by BMC Software and Actuate Software Corporation. The tools you use to create, schedule, view, and print reports include:

- Reporting Portal (recommended application – see Chapter 3, “Introducing the Reporting Portal,” for more information)
- Web Desktop
- QuickReport Editor

- Actuate Administrator Desktop
- Reporting Studio

Reporting Portal

You use the Reporting Portal, the recommended report viewing tool, to

- locate and view reports
- print and distribute reports
- view the contents of the Report Store

You access the Reporting Portal from a Web browser on a supported system or from the Reporting Portal icon on the Web Desktop.

For information on how to access the Reporting Portal and navigate through the Report Store, see Chapter 3, “Introducing the Reporting Portal.”

QuickReport Editor

You use the QuickReport Editor to

- create reports by defining new report templates based on specific PATROL parameters and events
- copy and modify report templates
- delete report templates
- schedule the report templates

Actuate Desktop Applications

The Actuate desktop applications include the Actuate Administrator Desktop and the Reporting Studio.

Actuate Administrator Desktop

You can use the Actuate Administrator Desktop to do the following on Windows machines:

- schedule report generation
- view reports locally
- print reports locally
- set user privileges

For information on how to use the Actuate Administrator Desktop, refer to *Viewing e.Reports*, *Using e.Reports*, or the Actuate Administrator Desktop online help.

Reporting Studio

You can use the Reporting Studio to do the following on Windows machines:

- customize reports
- schedule report generation
- view reports locally
- print reports locally

For information on how to use the Reporting Studio, see the Actuate documentation along with the *Service Reporting DataStore Schema*.

Warning

BMC Software distributes the Service Reporting Studio on the Service Reporting product CDs as the customizing component. This customizing environment is licensed *only* through the purchase of PATROL for Service Level Management.

Using the Web Desktop

While BMC Software recommends using the Reporting Portal (see Chapter 3, “Introducing the Reporting Portal”) for report viewing, you can also use the Web Desktop. Refer to “Actuate Desktop Applications” on page 2-3 for descriptions of other applications you can use to generate and view reports.

This section tells you how to:

- Access the Report Encyclopedia
- Use the Report Encyclopedia

Accessing the Report Encyclopedia

Using the Actuate Report Server and a Web server, you can access the Report Encyclopedia features of Service Reporting using a Web browser.

To access the Report Encyclopedia Web page you need one of the following Web browsers:

- Microsoft Internet Explorer, version 5.0 or later
- Netscape Navigator, version 4.0 or later

Note

The QuickReport Editor, a Java-based application where you can define and adjust reports, requires Microsoft Internet Explorer, version 5.0 or later, with the Java Virtual Machine installed or Netscape Navigator with the Java plug-in.

Using the Report Encyclopedia

Summary: This task describes how to access the Report Encyclopedia from your Web browser.

Step 1 Open your Web browser and type the following URL:
http://<Web server>/acweb/<report server>

<*Web server*> is the name of the Web server that is running the Web interface to the Report Encyclopedia
acweb is a keyword that is associated with the Report Encyclopedia
<*report server*> is the name of the volume of the Report Server where the Encyclopedia that you want to access is located

For example, to access reports from volume **jsmith** on Web server **jsmith**, you enter the following URL in your Web browser:

http://jsmith/acweb/jsmith

Step 2 The Report Encyclopedia main page displays to show the top-level folders.

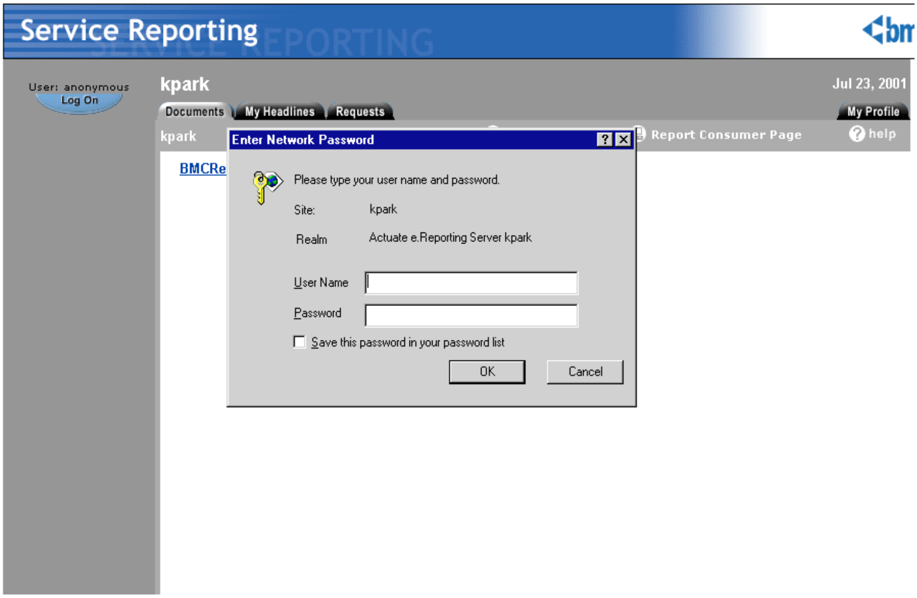
Logging in to the Report Encyclopedia

Summary: This task describes how to log in to the Report Encyclopedia from your Web browser so that you can schedule and generate reports, access the QuickReport Editor, and perform administrative tasks.

Step 1 Log in to the Report Encyclopedia (refer to "Using the Report Encyclopedia" on page 2-6). The Report Encyclopedia main page displays the top-level folders.

Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Figure 2-1 Accessing the QuickReport Editor



Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

- **User Name**: patrol
- **Password**: patrol

Looking at the Report Encyclopedia Using the Web Desktop

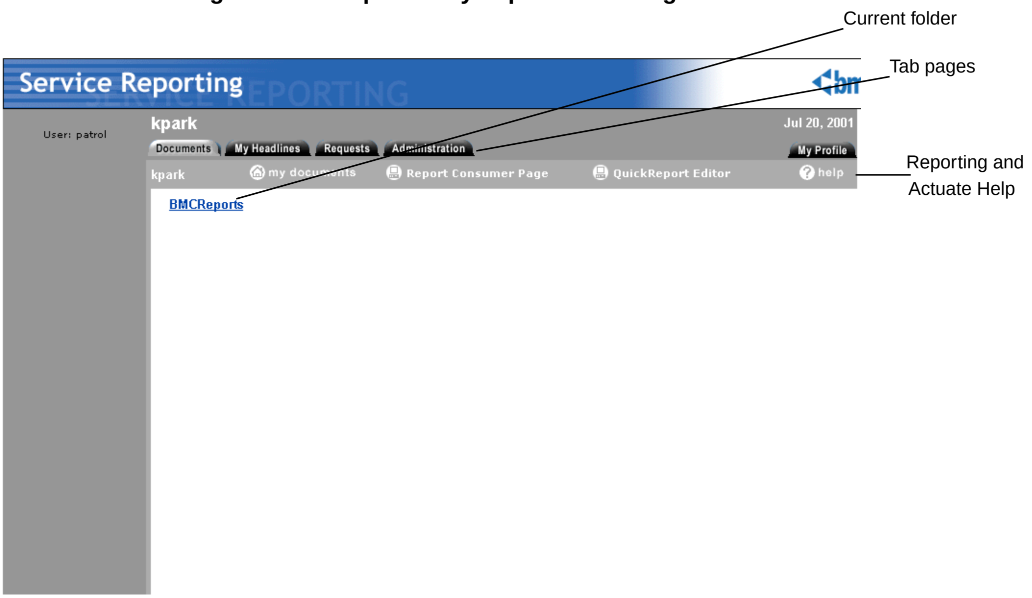
The Report Encyclopedia is an online storage area for your generated reports and report templates. The Report Encyclopedia also contains an administrative directory and requests and scheduling directories.

Note

You must have Actuate Administrator privileges to access the administrative directory. Contact your administrator for more information.

The Administration tab and the Reporting Portal and QuickReport Editor icons do not appear on the Web Desktop until you log in (see "Logging in to the Report Encyclopedia" on page 2-7). The following figure shows the Web Desktop after the user has logged on.

Figure 2-2 Report Encyclopedia Web Page



With the Report Encyclopedia Web page you can:

- view the contents of the Report Encyclopedia
- access the Report Encyclopedia hierarchy

- get detailed information about reports
- check on active and scheduled requests
- access your completed reports folder using My Headlines
- use the QuickReport Editor to create custom report templates from 10 report type templates, modify the customized templates, and delete templates

Using Tab Pages

The Report Encyclopedia's tab pages let you access additional functionality.

Note

While the tabs are visible as soon as you open the Web Desktop, they are not activated until you log in. See "Logging in to the Report Encyclopedia" on page 2-7 for instructions.

Table 2-2 Report Encyclopedia Tab Pages

Description	Files and Folders Accessed
Documents	Lets you access the Solution Reports. You might also see the personal folders of another person if they gave you access to them. Provides access to the QuickReport Editor link.
My Headlines	A list of completed reports including requests that you submitted and reports that other people requested be sent to you. Provides access to the QuickReport Editor link if you log on as administrator. You can also set up personal channels. For more information about channels and how to subscribe to a channel, refer to *Using the Actuate Web Agent* or the Web Agent online documentation.
Requests	Lets you see a list of reports that are ready for execution or are scheduled to execute at a certain time.

Table 2-2 Report Encyclopedia Tab Pages

Description	Files and Folders Accessed
Administration	Allows you to control and administer the Web Desktop if you have logged on with administrative privileges.
My Profile	Allows you to change your password and view your preferences.

Using the Documents Tab Work Area

The Report Encyclopedia's work area, located by clicking the **Documents** tab, lists the available reports and folders you can explore. When you select a report, each report contains the date of the report, the time it was created, and a Details icon containing additional information about each file.

Note

You can click the Details icon to get general status and privileges information for the folder or file.

Table 2-3 describes the components of the Report Encyclopedia Web page.

Table 2-3 Report Encyclopedia Components

Component	Description
Name	The Name column contains the list of available reports.
Version	The Version shows the version of the report that is available.
Date	The Date column contains the date that the administrator or user created the folder or file.
Details	The Details column contains status and other information for the associated folder or file, including the name of the log file.

Additional links:

- **QuickReport Editor**—Use to create custom reports
- **Reporting Portal**—Takes you to the Reporting Portal
- **Help**—Click to view the Reporting Online Help and the Actuate ReportCast® Online Documentation
- **My Documents**—Click to view the ReportCast Channels Personal Channel Page

Navigating the Report Encyclopedia with the Web Desktop

Before using the Web Desktop to explore the Report Encyclopedia, check with your administrator to find out if you can access reports on the Web.

Tip

If your administrator set up an anonymous user, you can access the Report Encyclopedia without logging in. To generate reports, however, you need to log in using the name and password provided to you by your administrator.

You can navigate the Report Encyclopedia just like any other Web site. Just enter a URL, click the available hyperlinks, or use the Tab pages to see the information you're looking for.

By default, Service Reporting installs a top level folder, **BMCReports**, and three subfolders.

- **Default**–contains both Solution Reports and QuickReports
- **ROX**–contains the libraries required to run the reports
- **zz_SysUtils**–contains administrative logs and files

You can work with the installed report folders or define your own.

The folders and subfolders you might be able to view include:

- **Default**

- Daily Reports
    - Windows NT
    - Unix
    - Exchange
    - Exchange 2000
    - Oracle
    - Lotus Domino
- Weekly Reports
    - Windows NT
    - Unix
    - Exchange
    - Exchange 2000
    - Oracle
    - Lotus Domino
- Monthly Reports
    - Windows NT
    - Unix
    - Exchange
    - Exchange 2000
    - Oracle
    - Lotus Domino
- ROV
- Objects/OnDemand Reports
- Miscellaneous

- **ROX**
- **zz_SysUtils**
    - Reports to run and view
        - filecleanup - daily, weekly, monthly
        - retriever_status_daily
        - Time Zone Sync (see the *DataStore Administrator Guide* for more information on time zone administration)

Some of the top-level hyperlinks that might appear:

Table 2-4 Report Encyclopedia Top-Level Hyperlinks

Hyperlinks (Folder)	Links to
BMCReports	QuickReports, Solution Reports, and ROV files
Exchange 2000	Solution Reports for Microsoft Exchange 2000 and ROV files

Table 2-4 Report Encyclopedia Top-Level Hyperlinks

Hyperlinks (Folder)	Links to
Exchange	Solution Reports for Microsoft Exchange Server and ROV files
Windows NT	Solution Reports for Microsoft Windows 2000 Server and ROV files
Domino	Solution Reports for Lotus Domino and ROV files
Oracle	Solution Reports for Oracle and ROV files
Unix	Solution Reports for Unix and ROV files

Navigating in the Report Encyclopedia

Summary: This task describes how to navigate in the Report Encyclopedia.

Step 1 Log in to the Report Encyclopedia (refer to "Using the Report Encyclopedia" on page 2-6). The Report Encyclopedia main page displays the top-level folders.

Step 2 On the Report Encyclopedia main page, click a folder's link (**BMCReports**) to display its available reports. The three default Service Reporting folders (Default, ROX, zz_SysUtils) are displayed.

Step 3 Click **Default** to display the report periods: Daily, Weekly, Monthly, and OnDemand.

Step 4 In the subfolder, click a date link to display its contents.

Step 5 In the subfolder, click a platform link to display its contents.

Step 6 In the subfolder, click a report link to display its contents.

Note

You can click **Back** in the browser's main toolbar to return to the Report Encyclopedia's main page. Alternatively, you can click the link to the folder or subfolder located above the list of contents.

Step 7 In the Report Encyclopedia, you can continue to click hyperlinks to explore the folders and files of the Report Encyclopedia.

Navigating the Reports

When you install Service Reporting, BMC Software creates the following three subfolders in the top level folder called BMCReports:

- Default
- ROX
- zz_SysUtils

Default contains both the QuickReports you create with the QuickReport Editor and the technology and application Solution Reports packages that came with Service Reporting.

ROX contains the libraries required to run the reports.

zz_SysUtils contains administrative logs and files.

You can work with the installed report folders or define your own.

Click a link to navigate the folders and subfolders to locate a document that you can view.

Navigating between the Report Encyclopedia and the Reporting Portal

To go from the Report Encyclopedia to the Reporting Portal, click the **Reporting Portal**.

To return from the Reporting Portal to the Report Encyclopedia, click the **Back** button on your Web browser.

Accessing the QuickReport Editor

Summary: This task describes three ways to access the QuickReport Editor.

- If you are running the QuickReport Editor on the same machine where it is installed, select **Start => Programs => BMC Software => PATROL => QRE**.

or

- If you are running the QuickReport Editor from a different machine than where it is installed, launch your Web Browser and enter the following URL:

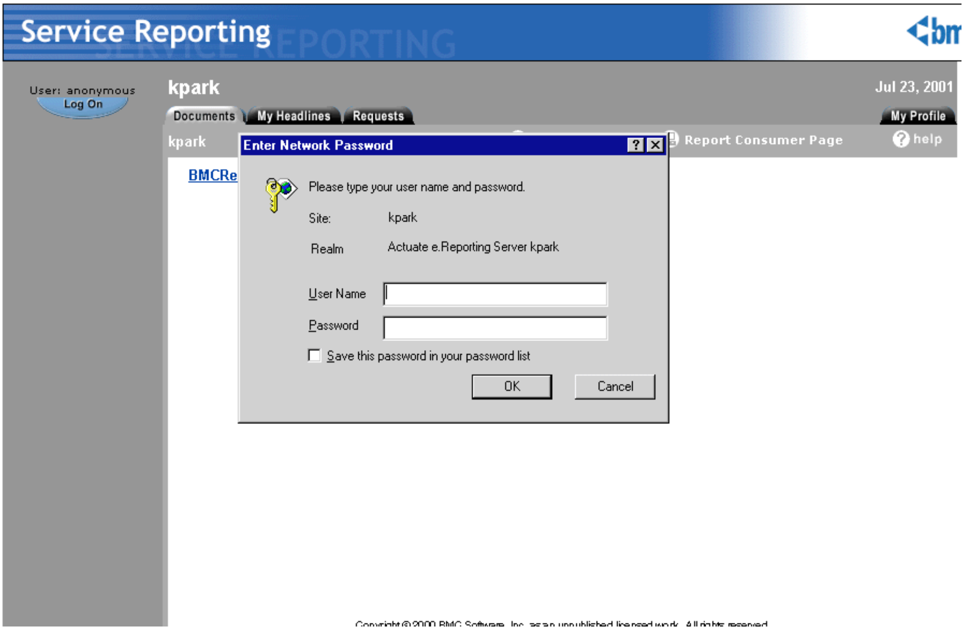
  http://*server-name*/bmcreports/qre.html

or

Step 1 Log in to the Report Encyclopedia (refer to “Using the Report Encyclopedia” on page 2-6). The Report Encyclopedia main page displays to show the top-level folders.

Step 2 On the Report Encyclopedia main page, click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Figure 2-3 Accessing the QuickReport Editor



Step 3 Enter the user name and password provided by your administrator. The default is:

- **User Name**: patrol
- **Password**: patrol

Step 4 Click **OK** to display the **QuickReport Editor** icon and name in the tool bar.

Step 5 Double-click the **QuickReport Editor** icon to display the QuickReport Editor Welcome page.

Step 6 From the Welcome Page you can create, delete, or modify QuickReport Editor reports. See Chapter 6, “Working with QuickReports” for more information.

3

Introducing the Reporting Portal

This chapter introduces the Reporting Portal, and includes the following topics:

How to Use This Chapter

Different users need different levels of information. This chapter contains information about the Reporting Portal infrastructure as well as procedural information for finding and viewing reports. To determine what part of this chapter is relevant to your job, answer the following question.

- If you want to understand the Reporting Portal infrastructure and how it works as well as how to find and view reports, you should begin with the “Overview” on this page.

- If you are simply interested in finding and viewing reports in the Reporting Portal, go to “Accessing the Reporting Portal” on page 3-8.

Overview

The Reporting Portal is a common Web application that provides a unified view of the report documents in the Report Store. You use it to search for, navigate, and display reports in a Web browser.

The Reporting Portal provides access to reports produced by a variety of applications including:

- Solution Reports
- QuickReport Editor (QRE)–generated reports
- PATROL for Service Level Management reporting
- Visualizer

Publisher Server

The Publisher Server executes report generation requests issued by Visualizer (see the *Visualizer User Guide* for more information). It sends a request to the Zone Index Server to generate a trace record for each report it generates. The Reporting Portal search utilities use the trace records to find and display reports.

The Publisher Server sends the reports it generates to the Report Store. The Report Store stores new report documents and selects report document aging policies.

Report Consumer Page

The Report Consumer Page is the entry point for users into the Reporting Portal. It consists of left and right panes. The left pane displays all search criteria used to find reports (see “Quick Search” on page 3-11 and “Advanced Search” on page 3-13). The selected search criteria are built into the report titles as they are generated and displayed in the Report Consumer Page.

The right pane dynamically displays the search results with columns that correspond to the search criteria you specified. Once the search results appear in the right panel, click the report you want to display.

The Report Store

The Report Store contains report documents generated by Service Reporting (Solution Reports and QuickReport Editor reports), PATROL for Service Level Management, and Visualizer.

It also contains the Zone Index Server which produces a trace record for each report generated. The trace records are used to find and view reports in the Reporting Portal.

Zone Index Server

There is a trace record generated and stored in the Zone Index Server for each report generated. The Reporting Portal uses the trace records to locate and display reports. Each record contains a pointer (URL) to a document in the Report Store.

The Reporting Portal search engine uses the Zone Index Server to find reports. Every time a report query is submitted, the Reporting Portal sends a command to the Zone Index Server. The Zone Index Server searches for all Zone Index records that match the query, and sends them back to the Reporting Portal. The Reporting Portal formats the matching records and displays them as an HTML page in the right pane.

The QuickReport Editor, Solution Reports, and PATROL Service Level Management send information directly to the Zone Index Server to create a record when the report is generated.

When Visualizer submits a report request, it sends a message to the Publisher Server. The Publisher Server generates the report and transfers the information to the Zone Index Server to create a record.

You cannot delete reports through the Reporting Portal. You must use the Actuate Administrator Desktop to delete reports. The Zone Index Server provides automatic clean up and manual delete facilities to delete the associated trace records.

For information on how to use the Actuate Administrator Desktop, refer to *Viewing e.Reports*, *Using e.Reports*, or the Actuate Administrator Desktop online help.

Automatic Clean Up Function

By default, the Zone Index Server cleans up trace records at 11 P.M. every day. The default value, `retention = 50`, is set in the policy file **idxcleanup.prop** located at **%PUBLISHER_HOME%\config**.

That means the Zone Index Server deletes trace records that are older than 50 days for daily reports, 50 weeks for weekly reports, and 50 months for monthly reports. You can customize the policy file using the following format:

retention[.<*IntervalType*>[.*StorageZone*>]] = numberOfIntervals

where
IntervalType = daily, weekly, or monthly
StorageZone = the location of the reports with their associated trace records

For example, if you want to set the daily trace record retention rate to 120 for reports stored in the Default storage zone, set the parameter to:

retention.daily.default = 120

If you want to set the daily retention rate for all storage zones, set the parameter to:

retention.daily = 360

All entries in the configuration file are case-insensitive. A text line that starts with the pound sign (#) is a comment line. You can enter any number in the numberOfIntervals line, but five is the minimum value.

To look up the ID for a specific report, use the following command-line syntax to run the command:

sr-trc-rm.bat -h <*hostname*> -p <*port*> -z <*storageZone*>
-t <*intervalType*> -s <*intervalStart*> -l

This produces a list of all the IDs and URLs for the reports located in the specified storage zone.

Manual Delete Utility

The Zone Index Server also includes a manual delete utility located in **%PUBLISHER_HOME%\bin**. The utility is called:

- **sr-trc-rm.bat -** Windows NT
- **sr-trc-rm.sh -** for Sun Solaris

This utility deletes individual trace records or a whole unit but not the report. The format is:

sr-trc-rm -h <*host*> -p <*port*> {-f <*xmlfile*>}|{-z <*storageZone*> -t <*intervalType*> -s <*intervalStart*> [-1] | [-u] | [i <*id id...*>]}

Table 3-1 Delete Facility Values and Descriptions

Value	Description
-h & -p	Specifies how to connect the Zone Index Server. If omitted, the values default to the local host and default port.
-z, -t, and -s	Specifies a trace record unit.
-i	Specifies unique trace record IDs.
-u	Means delete the whole unit specified by -z, -t, and -s.
-l	Lists the ID and URL of trace records in a unit.
-f	Specifies the XML file associated with the trace record to be deleted by the utility.

The XML file has one of the following formats:

```
<DELETE StorageZone=".." IntervalType=".."
IntervalStart=".." <RecordID Value=".." /> ..
<RecordID Value=".." /> </DELETE>
```

or

```
<DELETE StorageZone=".." IntervalType=".."
IntervalStart=".." <DeleteUnit/> </DELETE>
```

Synchronizing Trace Record Clean Up with Actuate Administrator Desktop Report Cleanup

Automatic Clean Up facilities deletes trace records, not reports. You delete reports using the Actuate Administrator Desktop. You must synchronize the deleting of trace records and the actual reports.

For example, if you use the Actuate Administrator Desktop to delete daily reports every 60 days, you should also set the trace record cleanup policy to reflect this by setting the retention parameter to 60. In **%publisher_home%\config\idxcleanup.prop**, set:

rentention.daily=60

Deleting Report Request Notifications

Also, though the Zone Index Server automatically deletes trace records, the Report Server does not automatically delete reports. The Report Server does automatically delete report request notifications. By default, it deletes successful request notifications every five days and every 14 days for failed requests for all users except for the Administrator. You must use the Actuate Administrator Desktop to manually set the corresponding property for the Administrator user.

For information on how to use the Actuate Administrator Desktop, refer to *Viewing e.Reports*, *Using e.Reports*, or the Actuate Administrator Desktop online help.

Generators

Currently there are four BMC Software reporting applications which are also Service Reporting report generators. The four generators which can publish data to the Reporting Portal are:

- PATROL Service Level Management
- QuickReport Editor
- Solution Reports

- Visualizer

The QuickReport Editor, Solution Reports, and PATROL for Service Level Management generate reports through the Actuate Report Server. They send information directly to the Zone Index Server to create a record (a registry entry) when the report is generated.

Note

You cannot use the Reporting Portal to view reports scheduled to run Now with the QuickReport Editor. You need to view them in the Web Desktop or the Actuate Administrator Desktop.

Visualizer is a little different. Every time Visualizer generates a report, it sends a message to the Publisher Server. The Publisher Server then transfers the information to the Zone Index Server to create an entry in the registry.

The registry entry records build the index that the search facilities use to find and view reports in the Reporting Portal.

Accessing the Reporting Portal

The Reporting Portal is a Web application where you can find and view graphs and reports. You can use the Reporting Portal through a Web browser such as Microsoft Internet Explorer 5.0 or later or Netscape 4.5 or later.

Note

BMC Software recommends using Microsoft Internet Explorer 5.0 or later as your Web browser.

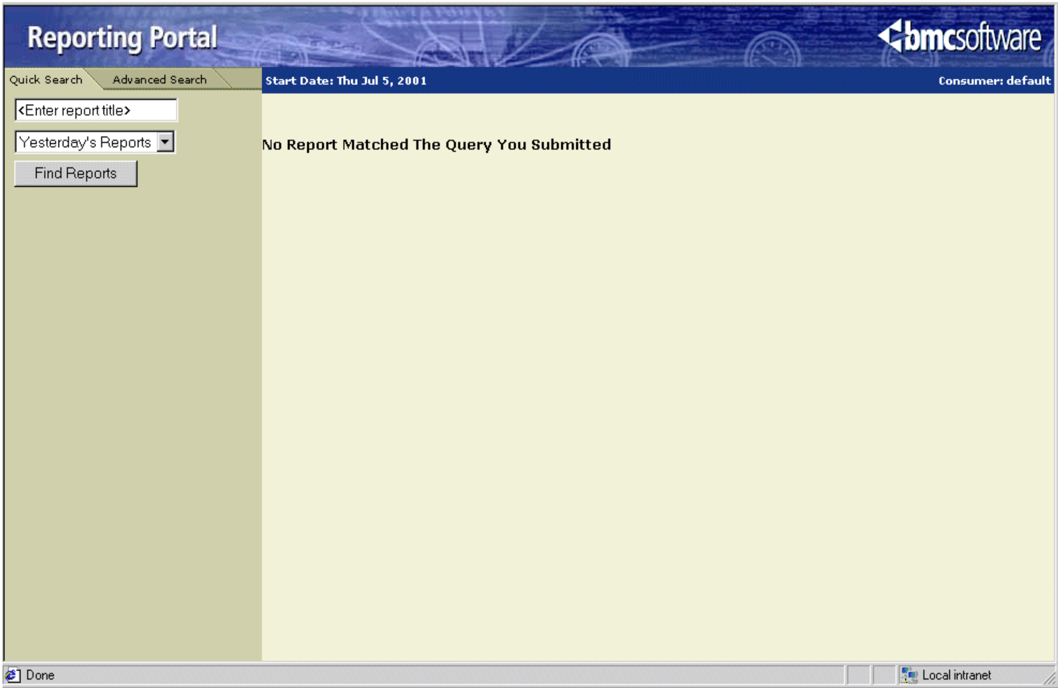
---

1. Use one of the following methods to access the Reporting Portal.

A. Start your Web browser and enter the following URL: **http://webserver_hostname/rportal/consumers/default/index.html** to open the Reporting Portal.

B. From the Web Desktop, click **Reporting Portal**. See “Using the Report Encyclopedia” on page 2-6.

Figure 3-1 Default Reporting Portal



Tips for Connecting to the Reporting Portal

There are three Service Reporting services related to the Reporting Portal that are laid down during Service Reporting installation. When you reboot after installation, the services are automatically set to Start. If you are having trouble accessing graphs and reports in the Reporting Portal, choose **Start** => **Settings** => **Control Panel** => **Services** to make sure that the following services are Started and Automatic:

- Reporting Portal Publisher Server
- Reporting Portal Zone Index Server
- Tomcat for Reporting Portal

Accessing the Web Desktop from the Reporting Portal

If you want to access the Report Encyclopedia from the Web Desktop for administrative functions, see "Using the Report Encyclopedia" on page 2-6.

Finding Reports in the Reporting Portal

The Report Consumer Page is the entry point for users into the Reporting Portal. Each Report Consumer Page serves one report consumer. It consists of left pane and right pane. The left pane displays all search criteria (see "Quick Search" on page 3-11 and "Advanced Search" on page 3-13). The search criteria are built into the reports as they are generated.

The right pane dynamically displays the search results with columns that display the search criteria. Once the search results appear in the right pane, you just double-click the report you want to view to display.

The default view of the right pane shows:

- Consumer: – Displays the report consumer name which is **default**.
- Reports: – Displays the report period (daily, weekly, monthly), the starting date of the data, the Report Title, the data Platform, and the Report Generator (PATROL Service Level Management, QuickReport Editor, Solution Reports, Visualizer). The default search criteria is Yesterday's Reports.

Search Facilities

The Reporting Portal includes search facilities for building your own queries to the Zone Index Server where reports are stored. The Reporting Portal left pane displays the search facilities. You can do a Quick Search or an Advanced Search by selecting the appropriate tab.

Quick Search

The following figure shows the Reporting Portal Quick Search tab.

Figure 3-2 Reporting Portal Quick Search

Use the following fields to perform a Quick Search of the Zone Index Server.

- <Enter report title> (optional) – If you know the name of the report you want to view, you can enter the report name or a sub–string of the name. For example, if you are looking for Disk Hierarchy graphs, you can enter Disk in the Report title field. The search engine is not case sensitive.

- Yesterday's Reports (required) – From the drop down list, you can select:

    - Today's Reports – reports on the current calendar day, a day being defined as 12:00 A.M. through 11:59 P.M.

- Yesterday’s Reports (default) – reports on the day prior to the current calendar date, a day being defined as 12:00 A.M. through 11:59 P.M. For example, if today is August 1st and you select Yesterday’s Reports, the Reporting Portal will display reports for July 31st.

- This Week’s Reports – reports on the current calendar week, a week being defend as 12:00 A.M. Sunday through 11:59 P.M. Saturday. If it you select This Week’s Reports on a Wednesday, you get data for Sunday through Wednesday.

- Last Week’s Reports – reports on the week prior to the current calendar week, a week being defined as 12:00 A.M. Sunday through 11:59 P.M. Saturday.

- This Month’s Reports – reports on the current calendar month.

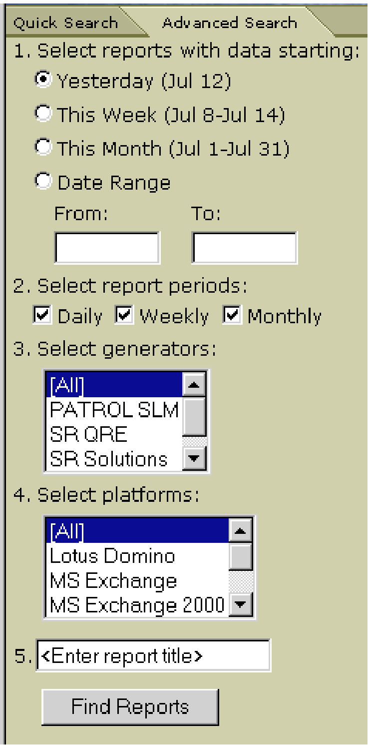
- Last Month’s Reports – reports on the month prior to the current calendar month.

Click **Find Reports** to initiate the search.

Advanced Search

The following figure shows the Reporting Portal Advanced Search tab.

Figure 3-3 Reporting Portal Advanced Search



The available fields in the Advanced Search window correspond to records entered in the Zone Index Server. You can use any combination of those records to locate your report.

1. Select report start dates (required): – Use the start dates of the reports as a search criteria. The default value is Yesterday. The dates are dynamically populated based on the current day's date.

   - Yesterday – a day is defined as 12:00 A.M. through 11:59 P.M.

   - This Week – a week is defined as 12:00 A.M. Sunday through 11:59 P.M. Saturday.

- This Month – the current calendar month.

- Date Range – Select a date range within which the reports you want to view fall. For example:

    - If you select, From: 03/01/2001 To: 03/31/2001, the Zone Index Server returns 31 days of daily reports, four weeks of weekly reports (3/4–3/10, 3/11–17, 3/18–24, 3/25–31), and one monthly report.

    - If you select, From: 03/07/2001 To: 03/28/2001, the Zone Index Server returns 22 days of daily reports and three weeks of weekly reports (3/11–17, 3/18–24, 3/25–28).

Note

If there is no data for a given day, a blank report is generated.

2. Select report periods (optional): Use the reporting period as a search criteria. You can use any or all periods. By default all periods are selected.

    - Daily
    - Weekly
    - Monthly

3. Select generators (optional): Use the application that generated the report as a search criteria. For the current release, you can select from the following applications:

    - [All] – Solution reports, QuickReports, Visualizer reports and PATROL Service Level Management reports
    - PATROL SLM – PATROL for Service Level Management
    - SR QRE – Service Reporting QuickReport Editor
    - SR Solutions – Service Reporting Solutions
    - Visualizer – Visualizer

4. Platforms (optional): Use the platform of the data in the reports as a search criteria. You can select any, all, or any combination of the following platforms:

- All – Searches for and returns reports for all platforms.
- Lotus Domino – Searches for and returns reports for Lotus Domino data.
- MS Exchange – Searches for and returns reports for Microsoft Exchange data.
- MS Exchange 2000 – Searches for and returns reports for Microsoft Exchange 2000 data.
- NT – Searches for and returns reports for Windows NT and Windows 2000 data.
- Oracle – Searches for and returns reports for Oracle data.
- Unix – Searches for and returns reports for Unix data.

5. <Enter report title> (optional): – Use the name of the report you want to view or a sub–string of the name. For example, if you are looking for Disk Hierarchy graphs, you can enter Disk in the Report title field. The search engine is not case–sensitive.

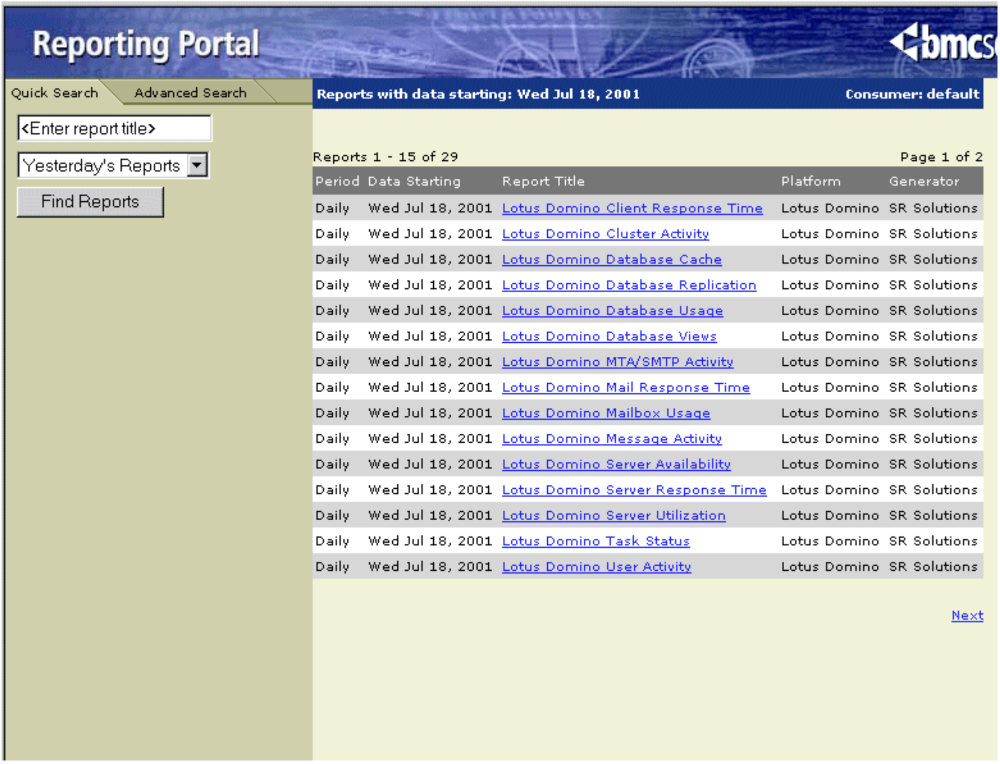
Click **Find Reports** to initiate the search.

Viewing Reports in the Reporting Portal

The returned reports appear in the right pane. The column headings in the right pane correspond to the Advanced Search criteria in the left pane.

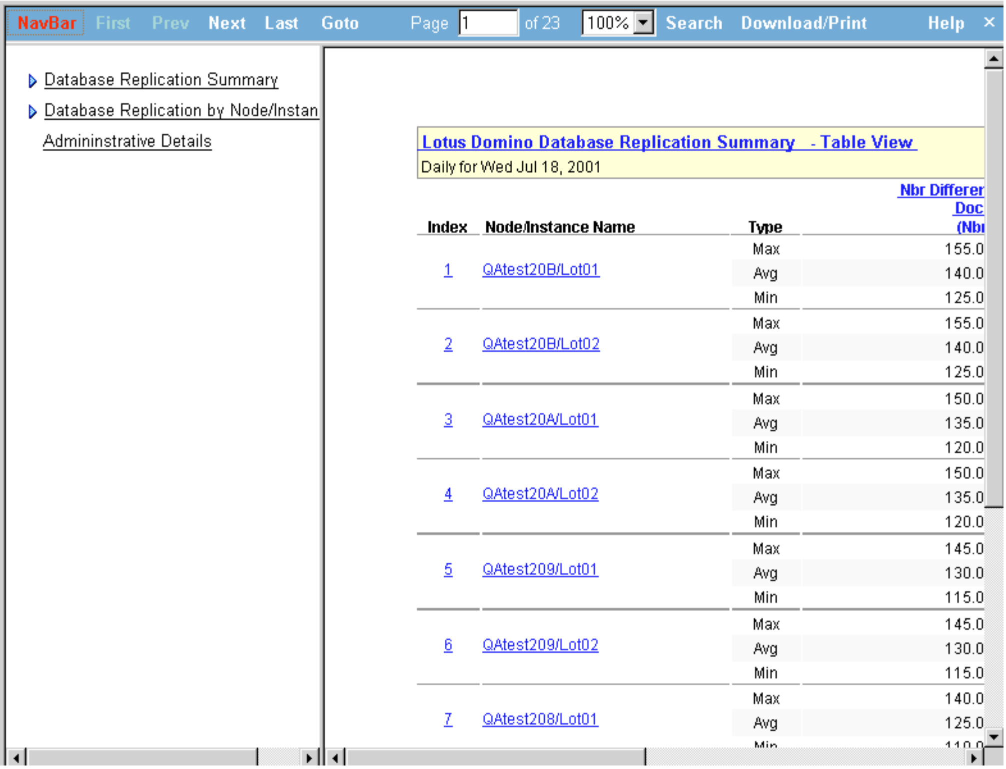
- Period
- Date
- Report Title
- Platform
- Generator

Figure 3-4 Results of Search Displayed in the Reporting Portal



Click the report you want to view. Click **NavBar** on the main menu to activate the right pane/left pane navigation feature as shown in the following figure.

Figure 3-5 Right pane/left pane navigation feature



Navigating Multi-Parameter Reports

The multi-parameter summary tables and graphs show up to eight parameters across the nodes/instances in your enterprise for which there is collected data. You can view the same information in table format or in graph format. You can drill down to the detail level from these reports.

With the NavBar activated, you will see a table of contents with the summary report name, the summary report name by node, and a link to the administrative details of the report. Click the report titles to expand the tree to see and navigate to pages in the summary tables or graphs.

Note

Lotus Domino reports display up to 10 nodes/instances.

Table View

The first column displays an index number for each node. The index acts as a legend for the summary graphs which follow the summary tables. For example, in the summary table, node AABC might be listed as three in the index. In the graph views that follow, the graph labeled three is node AABC.

The second column lists all the nodes on which the selected parameters have been collected.

The third column displays the type of value retrieved from DataStore for each parameter: maximum (max), average (ave), and minimum (min) value.

The nodes or nodes and instances are sorted in either ascending or descending order on the first parameter average value (fourth column) or the alphabetical order of the node/instance name.

You can navigate to the summary graphs by clicking the pages in the table of contents or the parameter you want to see.

Graph View

The nodes in the summary table are linked to comparable graph views. Click on a node in the summary table to go to the graph view of the parameters collected for the all the node.

You can return to the table view by clicking the table of contents or clicking the top n nodes in the upper right of the graph view report title.

Planning Your Reporting Strategy

This chapter describes the QuickReports and Solution Reports, proposes reporting checklists, and provides some examples that might help you plan a reporting strategy to manage resources in your distributed environment. You need to determine what reports you need and who needs to access these reports.

Introducing Report Types and Templates

Service Reporting reports are based on report templates. Service Reporting provides predefined report templates for specific technologies or applications and QuickReport types that you can customize to create new report templates to meet your enterprise reporting requirements.

QuickReport types are a class of report templates. Report templates are definitions that direct Service Reporting to extract data from the DataStore for a given time span and to generate a presentation in the form of a graph, table, or chart.

Describing QuickReport Types

A QuickReport type is a general class of report templates that you can use to define a new report template. To define a new report template, you fill in values in a form, based on the selection of a QuickReport type.

Table 4-1 QuickReport Types

Report Types	Description
Hot Spots Table	Provides the measurement value of a particular enterprise component for a specified time span of the report and lists the top *n* or bottom *n* readings for a measurement or parameter.
Hot Spots Thresh-old Table	Given a PATROL parameter, list *n* component values where the user-specified threshold was crossed. The value can fall above or below the set threshold. The time span is specified by the user.
Multi-Quadrant Trend Graph	Displays up to 25 selected parameters as individual line graphs. A maximum of four graphs are displayed per report page.
Event Summary Table	Displays a customer-defined number of components and their associated events. Events can include alarms or warnings.
Summary Graph	Displays *n* number of components with the highest or lowest values of a parameter in bar graph format. The upper limit is 25 for Oracle, Miscrosoft Exchange, Microsoft Exchange 2000, Windows NT, and Unix. The upper limit for Lotus Domino is 10 nodes/instances.
Summary Table	Displays *n* number of components and their associated parameter values, in table format.
Trend Graph	Displays a measurement value of a set of components representing a specific time period. The time span is specified by the user.
Trend Graph (Multi-Parameter)	Displays multiple measurements for multiple components representing a specific time period. The time span is specified by the user.
Trend Table	Displays the measurement value of a set of components representing a specific time period, in table format. The time span is specified by the user.
Trend Table (Multi-Parameter)	Displays multiple measurements for multiple components representing a spe-cific time period. The time span is specified by the user.

Note

While technically there is no limit to the number of nodes/instances you can report on, the reality is that reports that are limited to 25 nodes/instances or less are more manageable and useful.

Using Location, Organization and Category to Limit the Scope of Reports

One way to speed population and report generation is to limit the scope of your reports. The DataStore offers you association tools to do that. Through the DataStore Console, you create location, organization, or category information as well as select a namespace that identifies the data you want associated with the specific location, organization, or category. As data from the selected namespace is collected, that data is associated in the DataStore with its location, organization, or category.

If you have set up association filters in the DataStore, you can select them in the QuickReport Editor. For more information on setting up location, organizations and categories, see the *DataStore Administrator Guide*.

Planning QuickReports Reporting

This section includes a checklist and a few examples to help you plan a reporting strategy for the use of QuickReport types. You can select from the following report types to create your own report templates when you use the QuickReport Editor:

- Hot Spots Table
- Hot Spots Threshold Table
- Multi-Quadrant Trend Graph
- Event Summary Table
- Summary Graph
- Summary Table
- Trend Graph
- Trend Graph (Multi-Parameter)
- Trend Table
- Trend Table (Multi-Parameter)

QuickReports Reporting Checklist

Plan to use the QuickReport Editor to create new report templates to satisfy your enterprise reporting needs if:

- you cannot find the report you need in the Solution Reports or you have not purchased optional solution reports to manage enterprise applications

- you created a new measurement or parameter not provided by your PATROL KM

- you already created a similar type report and a simple edit would provide the report template you require

Example: Locating Servers with the Least Available Space

A system manager wants to know the top five Microsoft Exchange servers for total message size, measured weekly, to determine if a requirement to consolidate or add resources exists.

The system manager uses the QuickReport Editor and creates a new Summary Graph report template. Using the QuickReport Editor, the system manager specifies the following report parameters:

- the report type—Summary Graph
- the association filters, including
  - the location —[All] (to select all locations)
  - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—MSEXCH_Server
- the instance—[All] (to select all instances)
- the parameter—ServerMsgSize
- the value—Top
- the number of values—5
- the summarization type—Average
- the summarization period—Weekly
- the unit of measure—average
- schedule—Recurring on Mondays at 13:30:00

The system manager can also specify meaningful report labels for the application and the parameter fields. The system manager also specifies a file name and a location to save the report to on the Template Folder and Filename page.

Figure 4-1 is a sample of the Data Selection Criteria page the planner used to create the new report template for the Microsoft Exchange Server Message Size report.

Figure 4-1 Data Selection Criteria Page

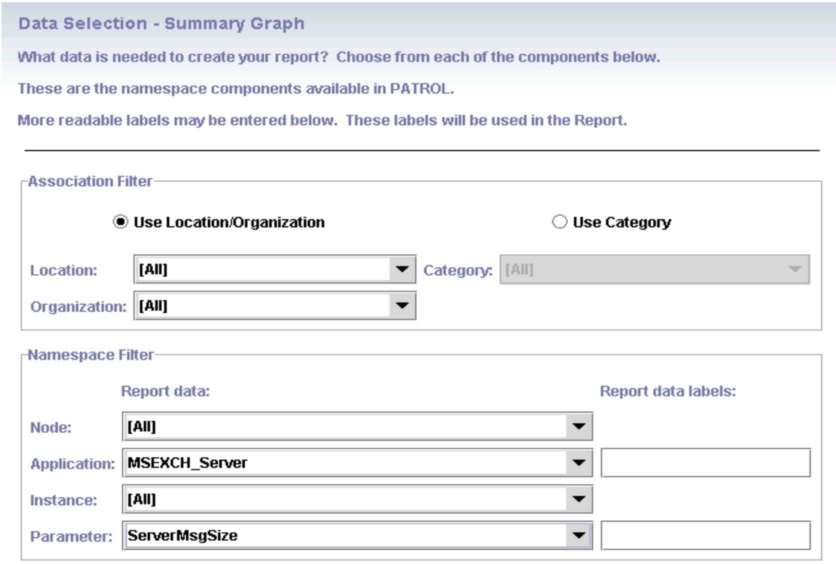
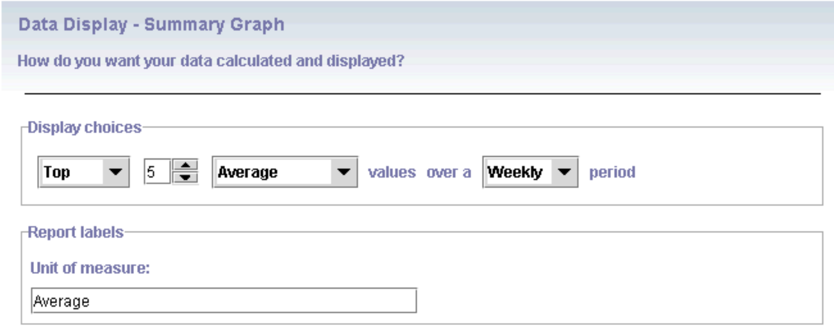


Figure 4-2 is an example of a Summary Graph Data Display page that the planner used to create the new report template for the Microsoft Exchange Server Message Size report.

Figure 4-2 Data Display Page



The system manager requested and receives notification that the report is finished. The system manager views and prints the report after accessing the Report Encyclopedia using a Web browser and the Web Desktop.

For more information on notification of report generation, refer to the Actuate documentation or online help for the Administrator Desktop.

Example: Examining Servers with Highest CPU Usage

A system administrator wants to know which five Windows NT servers in the enterprise have the highest average CPU utilization over a period of a week.

The system manager uses the QuickReport Editor and creates a new Summary Graph report. Using the QuickReport Editor, the system manager selects:

- the report type—Summary Graph

- the association filters, including
    - the location —[All] (to select all locations)
    - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—NT_CPU
- the report data label—Windows NT Servers
- the instance—[All] (to select all instances)
- the parameter—CPUprcrProcessorTimePercent
- the report data label—Percent CPU Utilization
- the value—Top
- the number of values—5
- the summarization type—Average
- the summarization period—Weekly
- the unit of measure—percentage
- schedule—Sundays at 13:30:00

The system manager also specifies a file name and a location to save the report to on the Template Folder and Filename page.

Figure 4-3 a sample of the Data Selection page the planner used to create the new report template for the Windows NT CPU Utilization report.

Figure 4-3 Windows NT CPU Utilization Data Selection Criteria Page

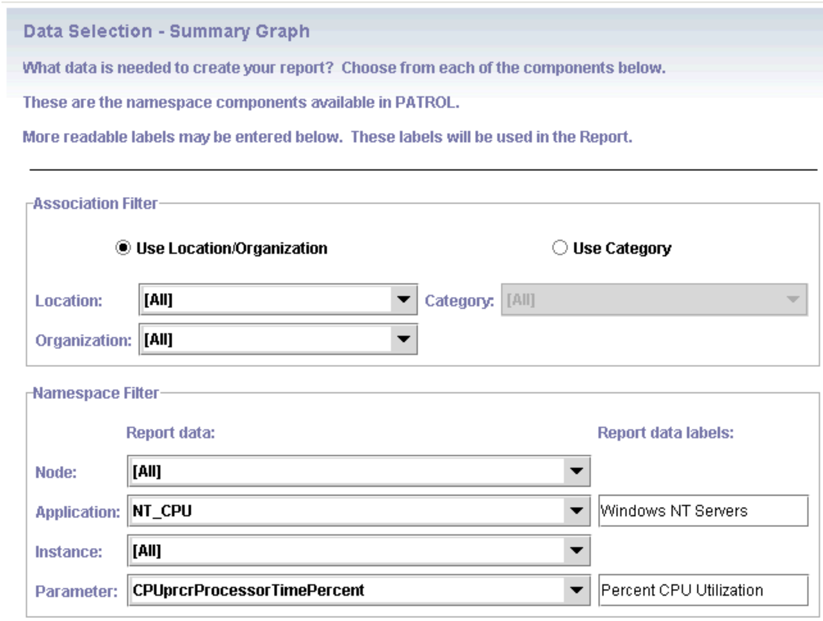
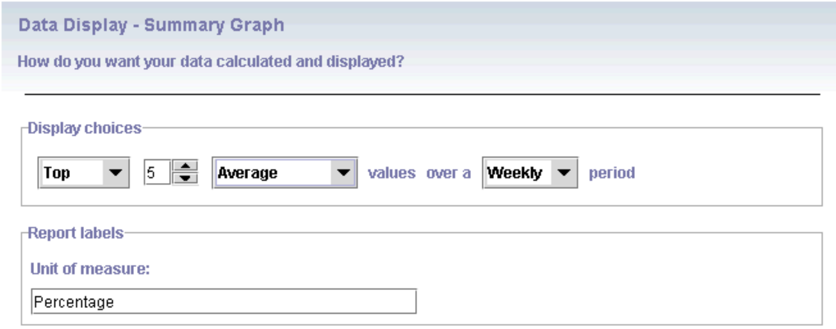


Figure 4-4 is an example of a Summary Graph Report Parameters page that the planner used to create the new report template for the Windows NT Server Percent CPU Utilization report.

Figure 4-4 Windows NT CPU Utilization Report Parameters Page



The system manager requested and receives notification that the report is finished. The system manager views and prints the report after accessing the Report Encyclopedia using a Web browser and the Web Desktop.

For more information on notification of report generation, refer to the Actuate documentation or online help for the Administrator Desktop.

Example: Finding Server Hot Spots

An information systems manager wants to know the 10 peak use periods for Window NT servers in the domain, and also wants to see if peak times occur on the same or different servers. The request is to create automatic reports that list these hot spots daily for a week.

You can use the QuickReport Editor and create a new report template with the Hot Spots Table template. Using the QuickReport Editor, select:

- the report type—Hot Spots Table
- the association filters, including
  - the location —[All] (to select all locations)
  - the organization—[All] (to select all organizations)

- the node—[All] (to select all nodes)
- the application—NT_CPU
- the report data label—Windows NT Workstations
- the instance—[All] (to select all instances)
- the parameter—CPUprcrProcessorTimePercent
- the report data label—CPU Utilization Hot Spots
- the value—Top
- the number of values—10
- the summarization type—Average
- the summarization period—Weekly
- the sub-span summarization period—Daily
- the unit of measure—percentage
- schedule type—Periodic
- schedule settings—daily at 06:00

Also enter labels that the report displays in the title, the subtitle, and unit label for the y-axis (which shows the unit of measure).

Figure 4-5 is a sample of the Data Selection Criteria page used to create the new report template for the Windows NT CPU Hot Spots report.

Figure 4-5 Windows NT CPU Hot Spots Data Selection Criteria Page

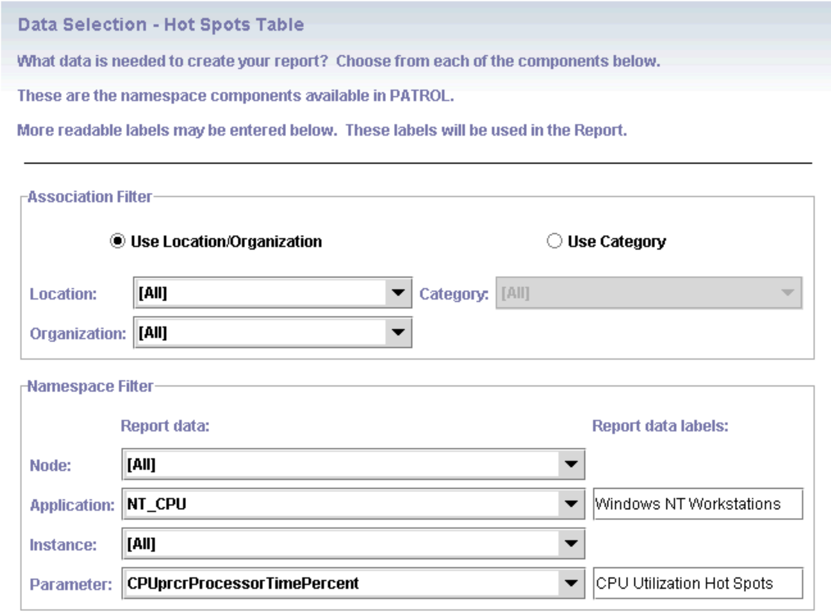
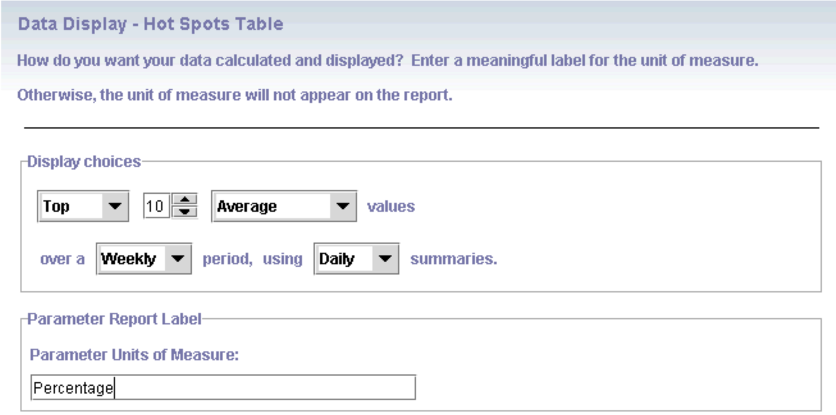


Figure 4-6 is an example of a Hot Spots Table Report Parameters page used to create the new report template for the Windows NT CPU Hot Spots report.

Figure 4-6 Windows NT CPU Hot Spots Report Parameters Page



Using Solution-Specific Reporting

This section includes a checklist and a few scenarios to help you plan a reporting strategy for the use of predefined reports. Service Reporting contains predefined reports of two types, the Basic OS report package (Windows 2000 Server and Unix) and optional application-specific report packages (Oracle, Microsoft Exchange 2000 Server, Microsoft Exchange Server, and Lotus Domino).

Note

To view specific Solution Reports, you must be licensed by BMC Software for the corresponding PATROL Knowledge Module™. For example, if you want to generate Solution Reports for Oracle, you must be licensed for PATROL KM for Oracle to collect the data. Contact your BMC Software representative for more information.

Solution Reporting Checklist

Plan to use the Solution Reports provided with Service Reporting to manage your enterprise if:

- you manage a Windows 2000 and Windows NT, or Unix server environment, or both
- you have not added Application measurements or parameters to your PATROL KMs
- you have purchased optional solution packages for your enterprise applications

Example: Selecting Windows NT Servers for Upgrading

A manager of information services and capacity planning has money in the budget to upgrade the Windows NT servers in the organization at the end of the year. The manager wants to know which five are the best candidates.

The IS manager decides to look at both weekly and monthly trends for the last five months. The IS manager asks a junior capacity planner to prepare reports at the beginning of each month for the previous month. The manager wants these reports to show the five servers with the highest average CPU use and the five top consumers of memory. The manager wants to use the internet to view the reports.

To create the reports with the information the manager requested, the capacity planner uses Service Reporting predefined solution reports for the Windows NT products. The planner logs in to the Reporting Portal using a browser (see “Accessing the Reporting Portal” on page 3-8) and locates the appropriate reports (see “Finding Reports in the Reporting Portal” on page 3-10).

Example: Locating Heavily Used Unix Servers

An information systems manager believes that some Unix servers in the organization may be over-utilized, and wants to know what to do to prevent future system problems. The information systems manager wants to take a look at several measurements within the enterprise, compare the results, and make the necessary decisions to keep the servers running efficiently.

The manager requests that a member of the staff create daily trend reports for the next few weeks with information on the top five servers in several categories. The manager wants printed copies of all reports for each staff member who attends the Wednesday afternoon meetings.

Planning Strategies for Mixing Reporting Types

This section includes a checklist and describes a scenario that might help you plan a reporting strategy for the use of both generic and solution reports for resources management in your enterprise.

Mixing Reporting Types Checklist

Plan to use a combination of QuickReports and predefined Solution Reports to satisfy your enterprise reporting needs if

- you manage a Windows 2000 or Unix server environment and not all your reporting requirements are met by the reports in the Windows 2000 or Unix reporting package
- you have purchased optional solution packages for your enterprise applications and you cannot find the report you need
- you have not purchased optional solution packages to manage enterprise applications
- you created a new measurement or parameter not provided by your PATROL KM

- you already created a similar QuickReport type report and a simple edit would provide the report you require

Example: Getting a Picture of the Enterprise

An information systems and capacity planning manager wants to understand the big picture of the organization for budget planning purposes. These are some of the questions that need answers:

- Do the Windows NT or Unix servers need to be upgraded?
- Is the computing power sufficient for the needs of the organization?
- Do the Oracle databases satisfy the needs of the organization?
- Does the organization need additional server space for Microsoft Exchange?

The manager asks a junior capacity planner to provide information to help make budget-planning decisions for the coming year.

To provide the manager with the information, the junior capacity planner decides to:

- check CPU usage and server memory availability measurements for Windows NT and Unix operating systems, as well as for the Microsoft Exchange and Oracle applications

- check for hot spots or peak use periods for Windows NT and Unix servers

The organization uses the Service Reporting product for predefined Solution Reports for Windows 2000 and Unix servers and the QuickReport Editor to customize report templates to meet their requirements. The enterprise also collects PATROL data for Microsoft Exchange Server and Oracle. The junior planner needs to use a combination of customized reports and Solution Reports to provide the information the manager requires.

The junior planner created a table like Table 4-2 to list the information needed, the report type, and the PATROL application classes and parameters that need to be analyzed.

Table 4-2 Reporting Requirements for the Enterprise

Requirement	Reporting Type	PATROL Application/Parameter
Find Windows NT CPU utilization hot spots (readings) daily for a week	customized Top N Hot Spots (Readings) Table report	NT_CPU/ CPUcrprProcessorTimePercent
Find the Unix CPU utilization hot spots (readings) daily for a week	customized Top N Hot Spots (Readings) Table report	CPU/ CPUUtil
Find the Oracle servers with the least capacity	predefined Solution Report	ORACLE_CAPACITY/ CusorsLeft
Find the Oracle servers with the least available space	customized Bottom N Summary Graph report	ORACLE_AVAILABILITY/ FreeSpace
Find the Microsoft Exchange servers with the highest memory usage	customized Top N Summary Graph report	MSEXCH_Server/ ServerMemory
Find the Microsoft Exchange servers with the greatest number of messages	customized Top N S Summary Graph report	MSEXCH_Server/ ServerMsgSize
Find the busiest Windows NT servers	predefined Solution Report	NT_CPU/ CPUcrprProcessorTimePercent
Find the Windows NT servers with the least available virtual memory	predefined Solution Report	NT_MEMORY/ MEMmemAvailableBytes
Find the Unix servers with highest CPU usage	predefined Solution Report	CPU/ CPUCpuUtil
Find the Unix server with the least available space	predefined Solution Report	FILESYSTEM/ FSAvailableSpace

Gathering Hot Spot Information Using the QuickReport Editor

The junior planner wants to create reports that show the 10 peak CPU utilization times for the Window NT and Unix servers in the domain for a period of a week. The planner uses the QuickReport Editor and creates new report templates with the Top N Hot Spots (Readings) Table template.

For the Windows NT Hot Spots report, the junior planner selects the following to create a new report template:

- the association filters, including
    - the location —[All] (to select all locations)
    - the organization—[All] (to select all organizations)
- the report type—Top N Hot Spots (Readings) Table
- the node—[All] (to select all nodes)
- the application—NT_CPU
- the instance—[All] (to select all instances)
- the parameter—CPUprcrProcessorTimePercent
- the value—Top
- the number of values—10
- the summarization values—Average
- the summarization period—Weekly
- the sub-span period—Daily
- schedule type—Periodic
- schedule settings—Sundays at 06:00

For the Unix Servers Hot Spots report, the junior planner selects the following to create another new report template:

- the report type—Top N Hot Spots (Readings) Table
- the association filters, including
    - the location —[All] (to select all locations)
    - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—CPU
- the instance—[All] (to select all instances)
- the parameter—CPUUtil
- the value—Top
- the number of values—10
- the summarization value—Average
- the summarization period—Weekly
- the sub-span period—Daily
- schedule type—Periodic
- schedule settings—Sundays at 06:00

Figure 4-7 is a sample of the Data Selection Criteria page the planner used to create the new report template for the Unix CPU Hot Spots report.

Figure 4-7 Sample Unix Hot Spots Data Selection Criteria Page

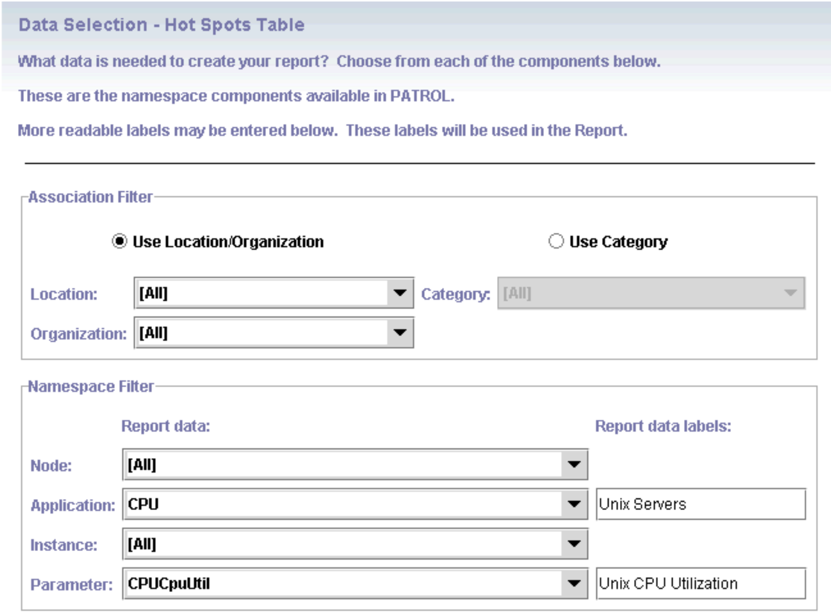
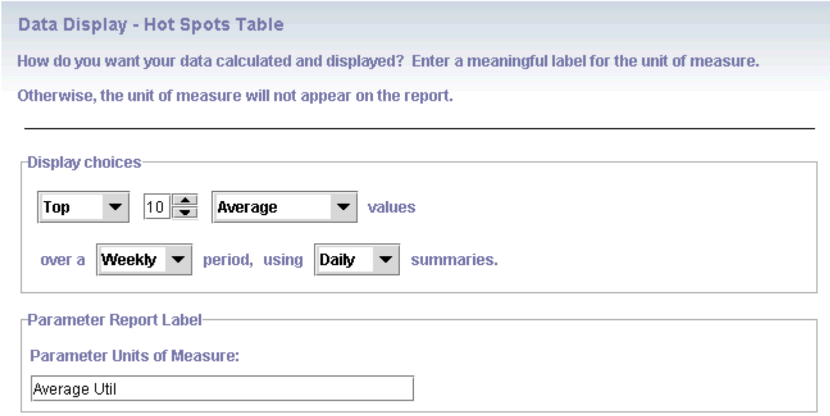


Figure 4-8 is an example of a Top N Summary Graph Report Parameters page that the planner used to create the new report template for the Unix CPU Hot Spots report.

Figure 4-8 Sample Unix Hot Spots Data Display Page



For an example of a Windows NT Hot Spots Report Parameters page, see Figure 4-6 on page 4-13.

Gathering Information on Oracle Servers Using the QuickReport Editor

The junior planner uses the QuickReport Editor to create the Oracle server reports.

- Servers with the least available capacity
- Servers with the least available space

The planner uses a Summary Graph report for both reports. In the QuickReport Editor, the planner specifies the following report parameters for a report that shows the Oracle servers with the least available capacity:

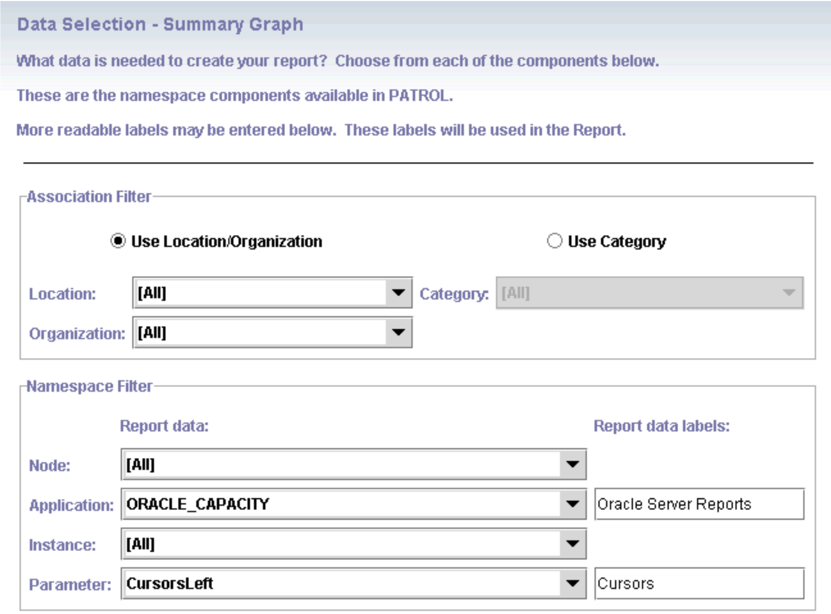
- the report type—Summary Graph
- the association filters, including
  - the location —[All] (to select all locations)
  - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—ORACLE_CAPACITY

- the instance—[All] (to select all instances)
- the parameter—CursorsLeft
- the number of values—5
- the summarization type—Average
- the time span—Weekly
- schedule—Recurring on Mondays at 13:30:00

The planner also enters report labels—Oracle Servers and Capacity, a units label—Cursors, and a file name and location into which to copy the report after the report is generated. Other parameters to look at to get a picture of the Oracle server capacity include: Locks Free (LocksFree), Processes Left (ProcsLeft), Sessions Left (SessionsLeft), and Transactions Left (TransLeft).

Figure 4-9 is a sample of the Data Selection Criteria page, the planner used to create the new template for this report.

Figure 4-9 Oracle Capacity Data Selection Criteria Page



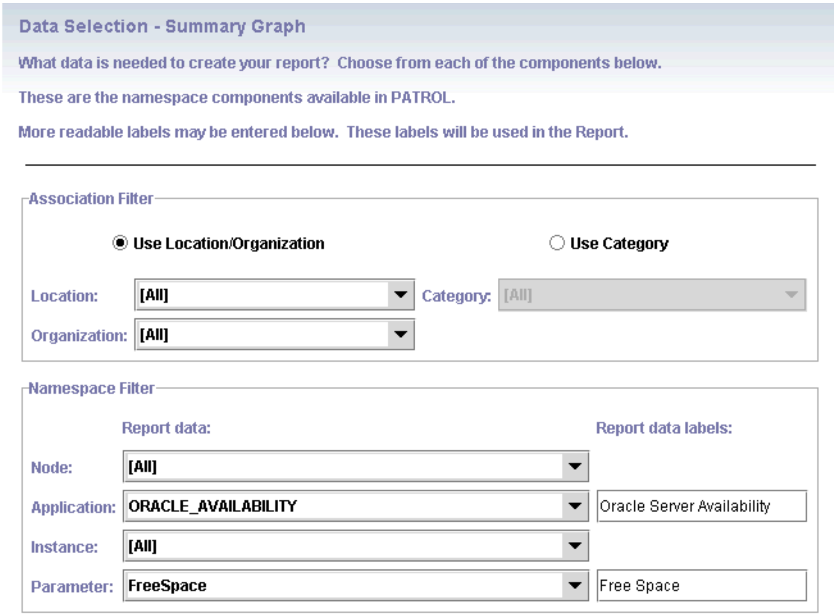
For the second report, the planner uses the QuickReport Editor, then specifies the following report parameters for a report that highlights the Oracle servers with the least available free space:

- the report type—Summary Graph
- the association filters, including
  - the location —[All] (to select all locations)
  - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—ORACLE_AVAILABILITY
- the instance—[All] (to select all instances)
- the parameter—FreeSpace
- the number of values—5
- the summarization type—Average
- the time span—Weekly
- schedule—Recurring on Mondays at 13:30:00

The planner also enters report labels—Oracle Servers and Least Available Space, a units label (%), and a file name and location into which to copy the report after the report is generated.

Figure 4-10 is a sample of the Data Selection page the planner used to create the new template for the Oracle Least Available Space report.

Figure 4-10 Oracle Availability Data Selection Criteria Page



Gathering Information on Microsoft Exchange Servers Using the QuickReport Editor

The junior planner uses the QuickReport Editor to create the Microsoft Exchange server reports.

- Servers with the highest memory usage
- Servers with the greatest number of messages

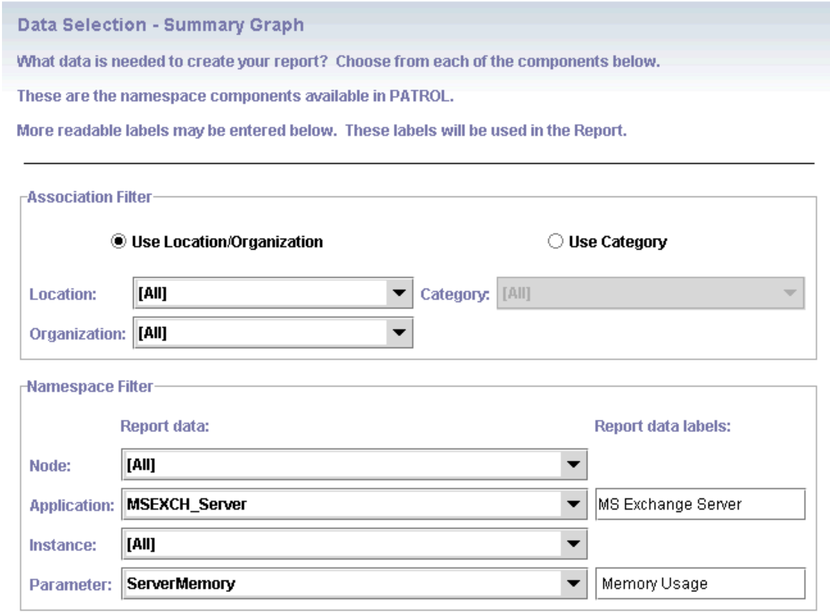
The planner uses a Top N Summary Graph report for both reports. In the QuickReport Editor, the planner specifies the following report parameters for a report that shows the Microsoft Exchange servers with the highest memory usage:

- the report type—Summary Graph
- the association filters, including
    - the location —[All] (to select all locations)
    - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—MSEXCH_Server
- the instance—[All] (to select all instances)
- the parameter—ServerMemory
- the number of values—5
- the summarization type—Average
- the time span—Weekly
- schedule—Recurring on Mondays at 13:30:00

The planner also enters report labels—MS Exchange Server and Memory Usage, a units label—Megabytes, and a file name and location into which to copy the report after the report is generated.

Figure 4-11 is a sample of the Data Selection Criteria page the planner used to create the new template for this report.

Figure 4-11 Microsoft Exchange Memory Data Selection Criteria Page

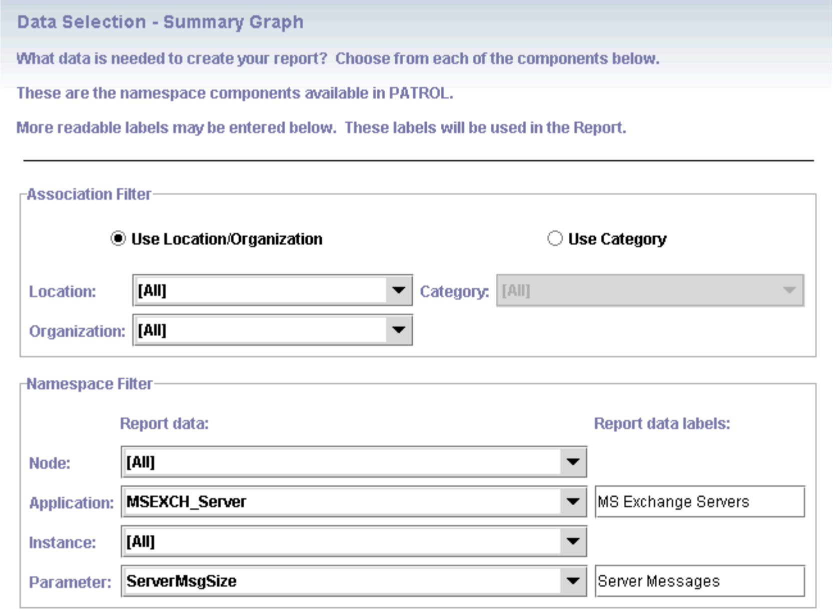


For the second report, the planner uses the QuickReport Editor, then specifies the following report parameters for a report that highlights the Microsoft Exchange servers with the greatest number of messages:

- the report type—Summary Graph
- the association filters, including
  - the location —[All] (to select all locations)
  - the organization—[All] (to select all organizations)
- the node—[All] (to select all nodes)
- the application—MSEXCH_Server
- the instance—[All] (to select all instances)
- the parameter—ServerMsgSize
- the number of values—5
- the summarization type—Average
- the time span—Weekly
- schedule—Recurring on Mondays at 13:30:00

The planner also enters report labels—Microsoft Exchange Servers and Server Messages, a units label—Count, and a file name and location into which to copy the report after the report is generated.

Figure 4-12 Microsoft Exchange Messages Data Selection Criteria Page



Locating Information on Windows 2000 Servers Using Solution Reports

The junior planner looks in the Report Encyclopedia for the weekly solution reports for the Windows 2000 servers for reports on

- the busiest servers
- servers with least available memory

Locating Information on Unix Servers Using Solution Reports

The junior planner looks in the Report Encyclopedia for the weekly solution reports for the Unix servers.

- Servers with the highest CPU usage
- Servers with least available space

The planner produces a sample report that shows the weekly summary of the five Unix servers with the highest CPU load as measured by the CPULoad parameter. The report is based on a Top N Summary Graph provided as part of the Solution Reports for Unix servers.

Creating, Scheduling, Viewing, and Printing Reports

This chapter describes how to create new reports, how to create reports by using existing documents as templates, how to schedule and generate your reports, how to locate and view reports, and how to print and distribute reports.

Creating Reports

You use the QuickReport Editor to create new report templates based on QuickReport types. With the QuickReport Editor, you can also edit existing report templates to create new report templates. You cannot design new report types or templates with the QuickReport Editor.

Creating a New Report Template with the QuickReport Editor

The QuickReport Editor leads you through a series of Web pages where you choose a QuickReport type and define additional parameters based on the selected report. You can select from the following reports:

- Event Summary Table
- Hot Spots Table
- Hot Spots Threshold Table
- Multi-Quadrant Trend Graph
- Summary Graph
- Summary Table
- Trend Graph
- Trend Graph (Multi-Parameter)
- Trend Table
- Trend Table (Multi-Parameter)

Additional parameters and selection criteria you can choose include:

- all or selected nodes
- parameters
- all or selected instances
- applications
- level of summarization (daily, weekly, monthly)
- time frame (yesterday, month, and so on)
- input to the report title, subtitle, and axis labels

Before you create and save the report template, you choose whether to generate the report immediately, to save the report to generate later, or schedule the report to generate on a periodic basis.

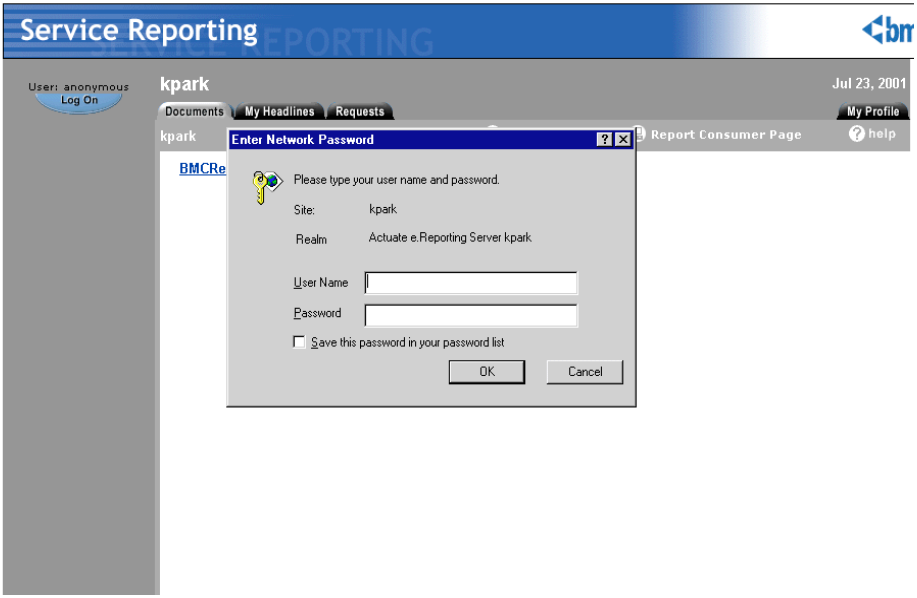
Creating a New Report

Summary: This task describes how to create a new report from a report template using the QuickReport Editor.

Step 1 Open your Web browser and enter the URL for the Report Encyclopedia. (See "Using the Report Encyclopedia" on page 2-6.)

Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Figure 5-1 Accessing the QuickReport Editor

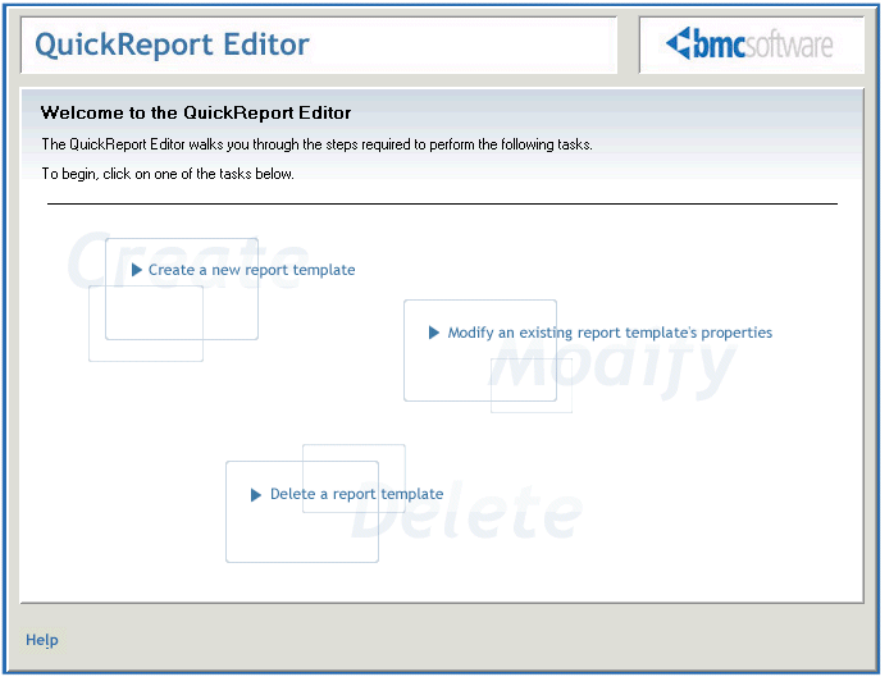


Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

- **User Name**: patrol
- **Password**: patrol

Step 4 Click **QuickReport Editor** to open the QuickReport Editor.

Figure 5-2 QuickReport Editor Welcome Page



Step 5 Click **Create a new report template** to open the Template Type Selection page.

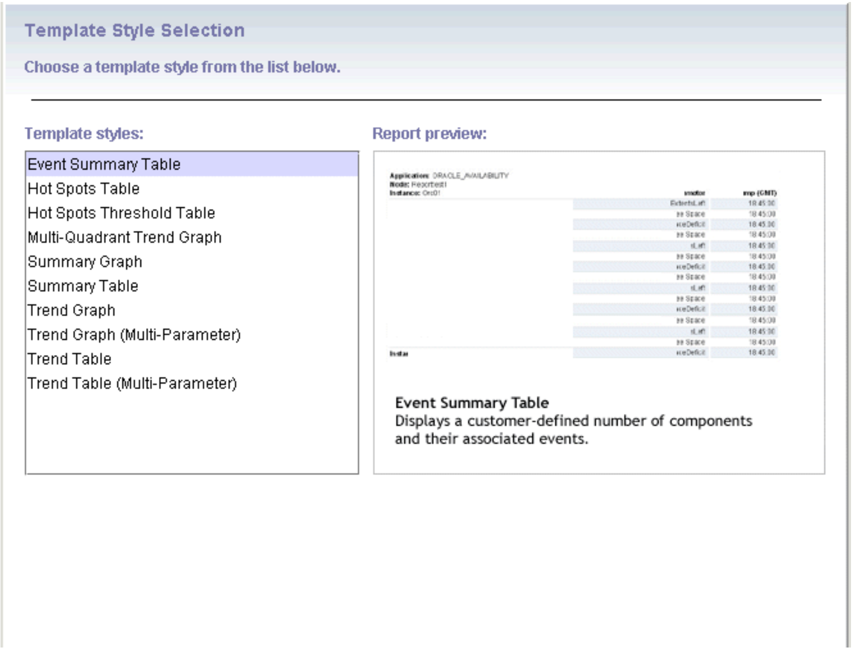
Note

Click **Previous** to move back to the previous page in the QuickReport Editor.

Click **Cancel** to cancel your report selections and return to the first page of the QuickReport Editor.

Click on the main Web browser window to bring the Report Encyclopedia to the front.

Figure 5-3 QuickReport Editor Template Style Selection Page



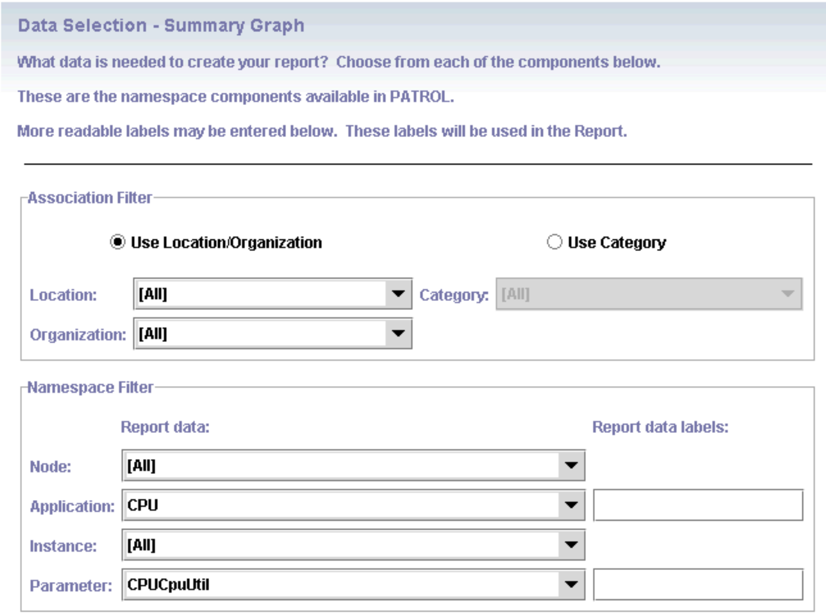
Step 6 On the Template Type Selection page, select the type of report template that you want to create:

- Event Summary Table
- Hot Spots Table
- Hot Spots Threshold Table
- Multi-Quadrant Trend Graph
- Summary Graph

- Summary Table
- Trend Graph
- Trend Graph (Multi-Parameter)
- Trend Table
- Trend Table (Multi-Parameter)

Then, click **Next** to open the Data Selection Criteria page.

Figure 5-4 Data Selection Criteria Page



Step 7 On the Data Selection Criteria page, you construct your data parameters. The values you need to select for this page depend on the report type you selected on the previous page.

7.A Select values for **Location** and **Organization** or **Category** from the available choices in their respective drop-down list boxes. To include all Locations and Organizations or Categories, select **[All]** from their respective drop-down list boxes.

7.B Select values for the **Node**, **Application**, **Instance**, and **Parameter** from the available choices in their respective drop-down list boxes. To include all Nodes and Instances, select **[All]** from their respective drop-down list boxes. While technically there is no limit to the number of nodes or instances you can report on, the reality is that reports that are limited to 25 nodes or instances or less are more manageable and useful.

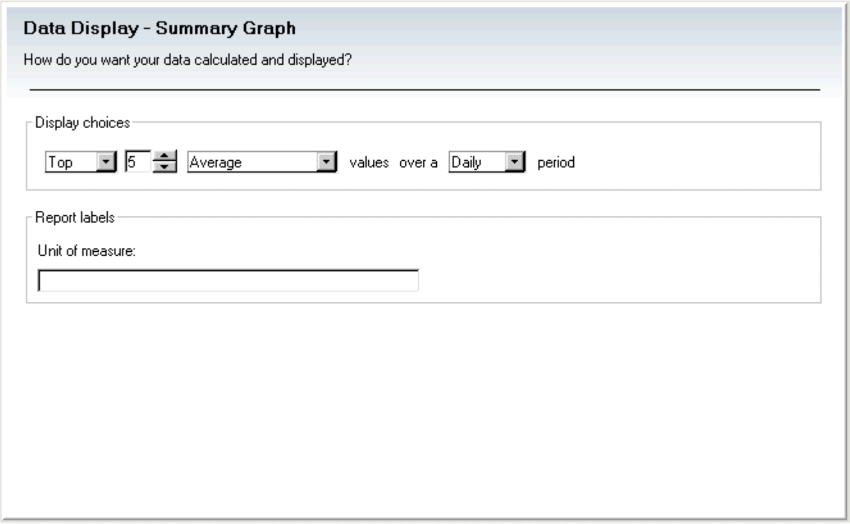
Note

Choices available on the Data Selection Criteria page depend on the report type you selected on the Template Type Selection page.

7.C Change the labels for the **Application** and **Parameter**, as appropriate. The QuickReport Editor inserts your inputs into the titles for the new report.

7.D Then, click **Next** to open the Display Choices page.

Figure 5-5 QuickReport Editor Report Display Choices Page



Step 8 On the Data Display page, select the parameters you want your report to open.

Note

Choices available on the Data Display page depend on the report type you selected on the Template Type Selection page. For example, if you selected a Hot Spot Table or Trend Graph, you need to enter additional parameters, for example, a sub-span period or a threshold value.

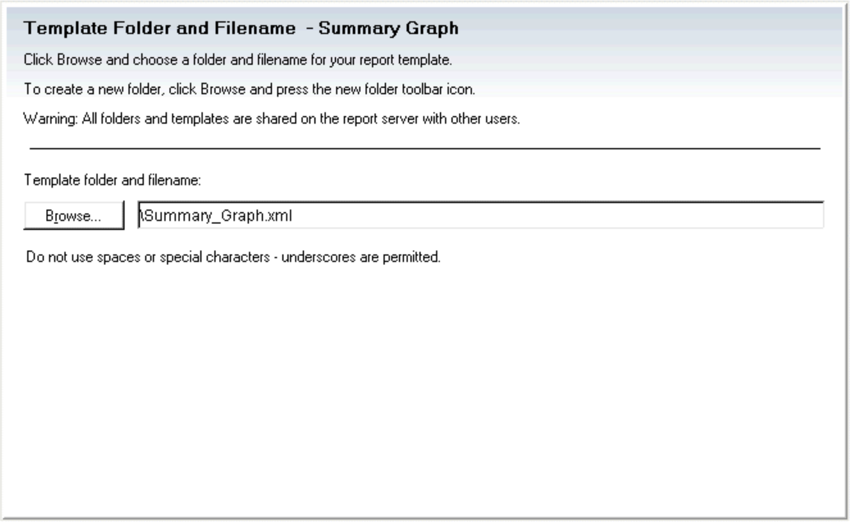
8.A Enter or select the top order values or the bottom order values that you want your report to display. The default is five.

8.B Select the summarization type parameter: **Average**, **Maximum**, **Minimum**, or **Sample_Count**.

8.C Select **Daily**, **Weekly**, or **Monthly** for the period to summarize.

8.D Then, click **Next** to open the Template Folder and Filename page.

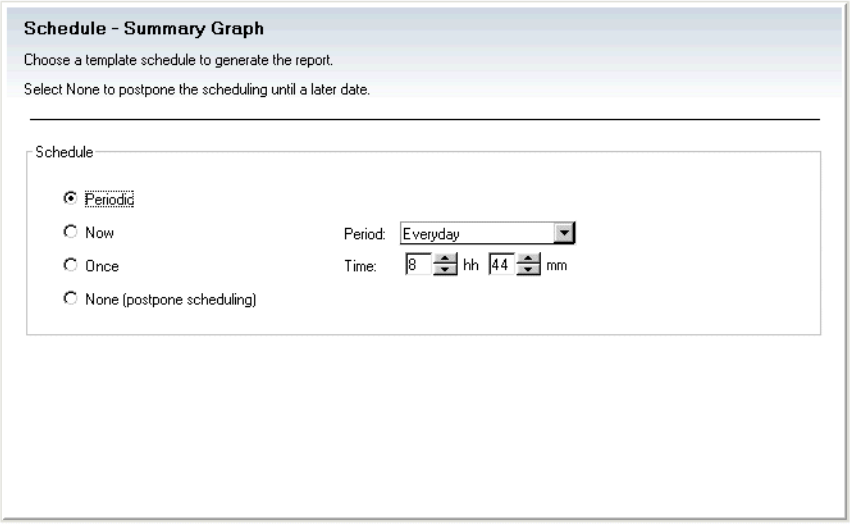
Figure 5-6 QuickReport Editor Template Folder and Filename Page



Step 9 On the Template Folder and Filename page, enter the report file name and folder for the report in the input box. Click **Browse** if you need to find or add a folder. Then, click **Next** to open the Schedule page.

To add a folder, click **Create New Folder**, type the folder name, press **Enter**, and click **OK**.

Figure 5-7   QuickReport Editor Schedule Page



Step 10 On the Schedule Page, set up the schedule to generate the report.

10.A Select the check box for the schedule you want to use to generate the report: **Periodic, Now**, **Once**, or **None (postpone scheduling)**.

Note

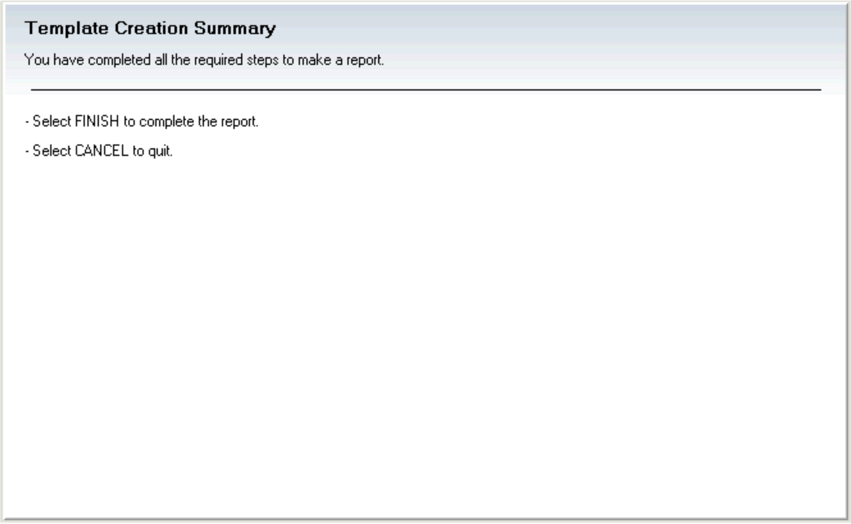
You cannot use the Reporting Portal to view reports scheduled to run Now. You need to view them in the Web Desktop or the Actuate Administrator Desktop.

10.B If you choose **Periodic** or **Once**, select the appropriate times from the drop-down boxes in the Settings area.

If you choose **None**, the QuickReport Editor creates a Report Template (Parameter Values file) from which you can generate a report at a later time.

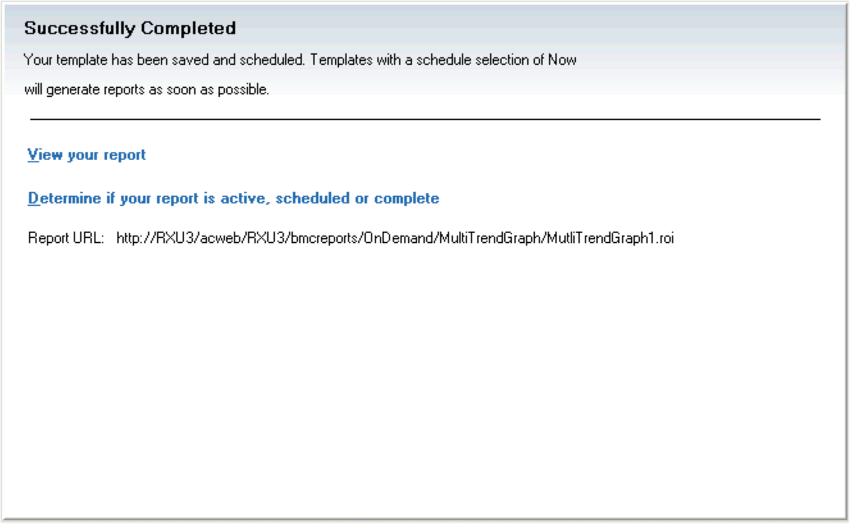
10.C Then, select **Next** to open the Template Creation Summary page.

Figure 5-8 QuickReport Editor Template Creation Summary Page



Step 11 On the Template Creation Summary page, click **Cancel** to return to the Welcome page or **Previous** to go back to previous pages and change any information. If you are satisfied with the report, click **Finish** to complete the report and display the Successfully Completed page.

Figure 5-9 QuickReport Editor Successfully Completed Page



Editing a Report Template with the QuickReport Editor

You can use the QuickReport Editor to edit existing report templates to create a new report. You might edit a report to change the PATROL parameter, the summarization type, the summarization period, or both the application and parameter.

Editing an Existing Report

Summary: This task describes how to create a new report by editing an existing report template using the QuickReport Editor.

Step 1 Log in to the Report Encyclopedia, if you have not already. (See "Using the Report Encyclopedia" on page 2-6.) The Report Encyclopedia folders display.

Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

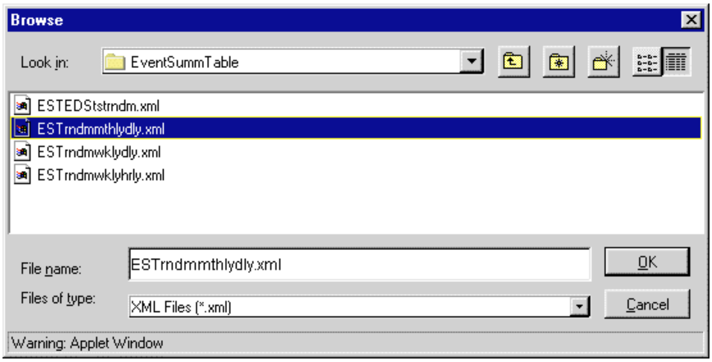
- **User Name**: patrol
- **Password**: patrol

Step 4 Click **QuickReport Editor** to open the QuickReport Editor.

Step 5 Click **Modify an existing report template's properties** to open the Report Template Selection page.

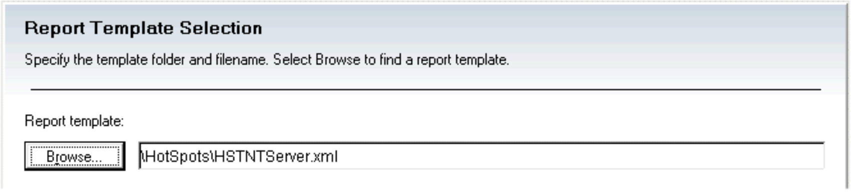
Step 6 On the Report Template Selection page, click **Browse** and select the report file you want to modify.

Figure 5-10 Report Template Selection Page Browse Window



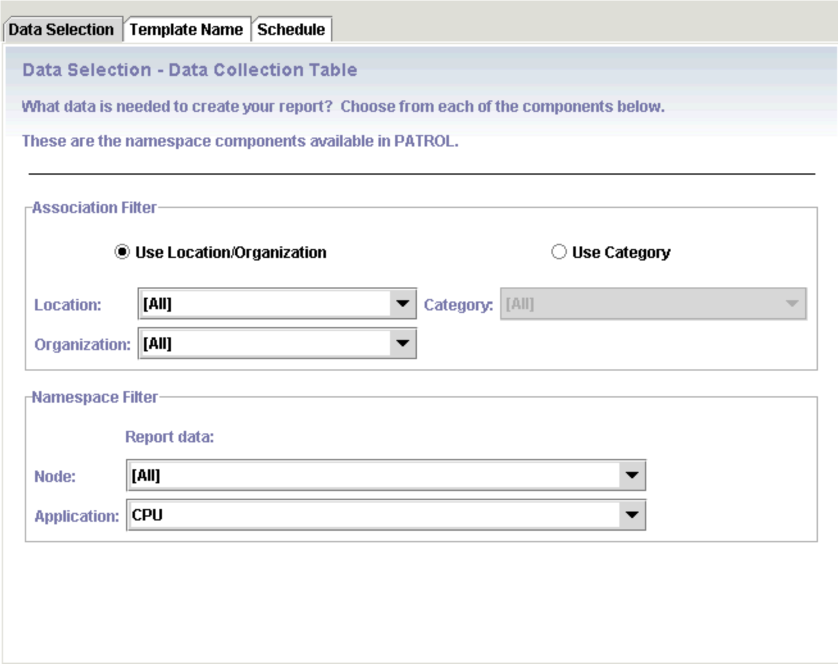
The name of the report file displays in the Report Template input box.

Figure 5-11 Report Template to Edit



Step 7 After you make your edit selection, click **Next** to open the Edit Data Selection page.

Figure 5-12 QuickReport Editor Edit Data Selection Criteria Page



Step 8 On the Data Selection Criteria page, create the parameters for your new report.

8.A Change the values for **Node**, **Application**, **Instance**, and **Parameter**, as required for your new report.

Again, the values displayed on the Data Selection page depend on the generic report type of the report you chose to edit.

8.B Change the values for the **Application** and **Parameter**, as appropriate.

8.C Click the tab of the next QuickReport Editor page where you need to make changes: **Data Display**, **Template Name** (required, unless you want to overwrite the existing report)**,** or **Schedule**.

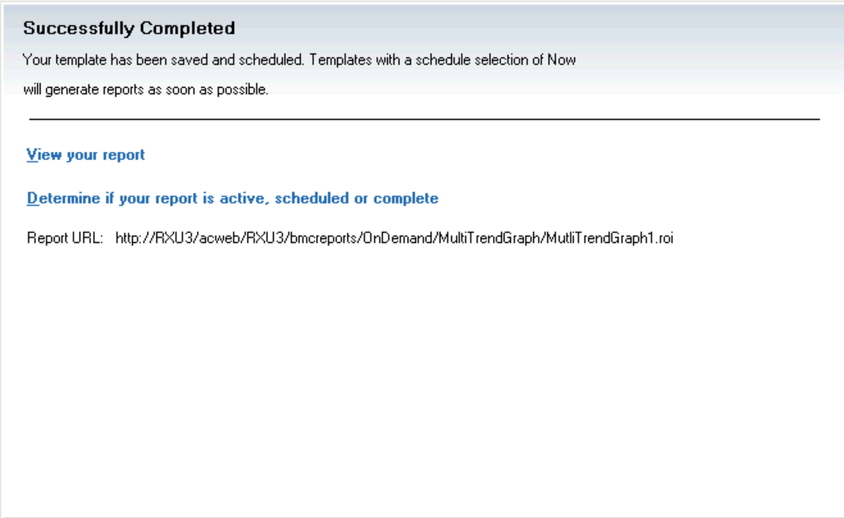
These are the same set of pages that you use when you create a new report.

8.D After you change report parameters, summarizations, scheduling, name and location to satisfy your new report requirements, click **Finish** on the Schedule page to open the Successfully Completed page.

Note

You can click **Cancel** to quit without saving or generating a report or **Previous** to go back to previous pages and change any information for the report.

Figure 5-13 QuickReport Editor Edit Successfully Completed Page



Deleting a QuickReport Template that You Created

You can use the QuickReport Editor to delete a template that you created.

Deleting a Template with the QuickReport Editor

Summary: This task describes how to delete a generic report template you created using the QuickReport Editor.

Step 1 Log in to the Report Encyclopedia, if you have not already. (See “Using the Report Encyclopedia” on page 2-6.) The Report Encyclopedia folders display.

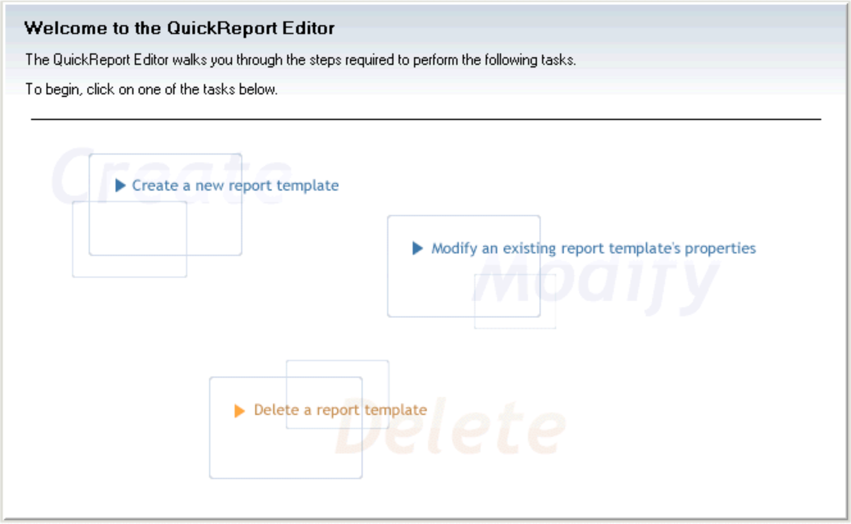
Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

- **User Name**: patrol
- **Password**: patrol

Step 4 Click QuickReport Editor to open the QuickReport Editor.

Figure 5-14 QuickReport Editor Welcome Page



Step 5 Select the **Delete a report template** link to open the Report Deletion dialog box.

Step 6 On the Report Deletion dialog, select a report file, and then click **Delete**. A confirmation message appears. Click **OK** to delete the report. Repeat to delete additional reports.

Scheduling and Generating Reports

You can schedule and generate reports on demand using Service Reporting. You might want to schedule and generate:

- a QuickReport created without a schedule
- a QuickReport to execute on a different schedule
- a Solution Report to execute immediately

For information

- specific to QuickReports, refer to “Scheduling QuickReports” on page 5-19
- specific to Solution Reports, refer to “Generating Solution Reports” on page 5-23

Scheduling QuickReports

To schedule and generate reports, BMC Software recommends that you use the editing function of the QuickReport Editor.

Scheduling a QuickReport Template

Summary: This task describes how to generate and schedule a report created with the QuickReport Editor from a Web browser using the Web Desktop.

Step 1 Open your Web browser and enter the URL for the Report Encyclopedia. (See “Using the Report Encyclopedia” on page 2-6.)

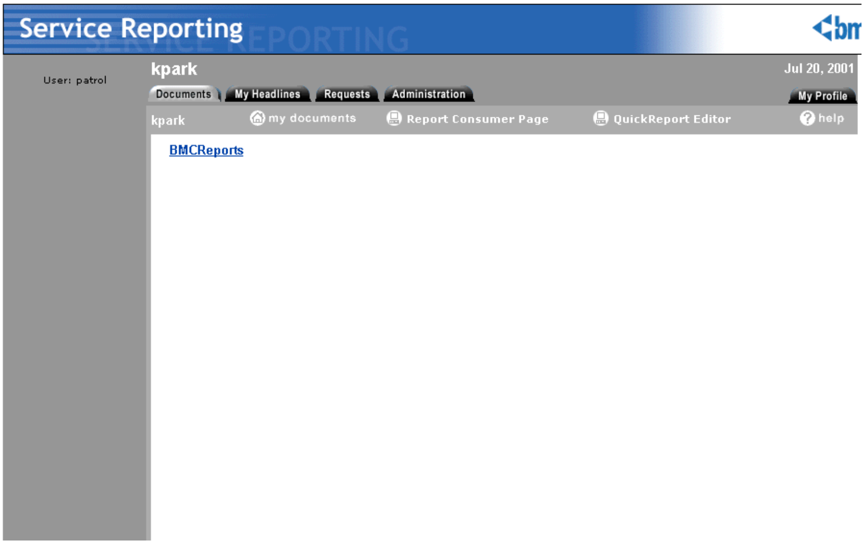
Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

- **User Name**: patrol
- **Password**: patrol

Step 4 Click **QuickReport Editor** to open the QuickReport Editor.

Figure 5-15 Report Encyclopedia Main Page



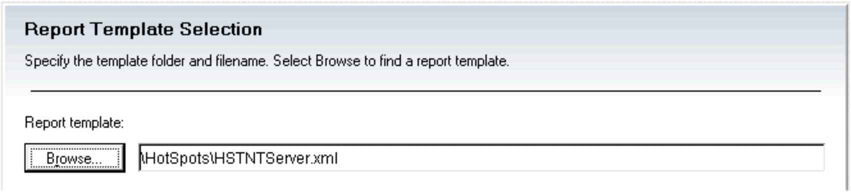
Step 5 Click the **My Headlines** tab to open the QuickReport Editor link.

Step 6 Click the **QuickReport Editor** link to launch the QuickReport Editor.

Step 7 Click **Modify an existing report template's properties** to edit an existing report template.

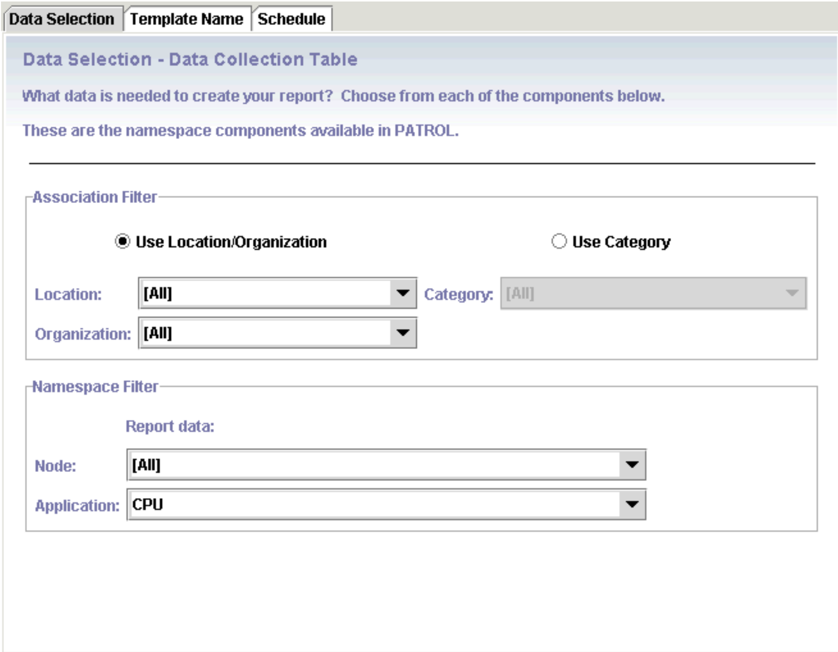
Step 8 Click **Browse** and select the report template you want to modify. The name of the report file displays in the Report Template input box.

Figure 5-16 QuickReport Editor Report Template Selection Page



Step 9 After you make your selection, click **Next** to open the Data Selection Criteria page.

Figure 5-17 QuickReport Editor Data Selection Page



Step 10 To schedule the report template to generate the selected report, click the Schedule tab.

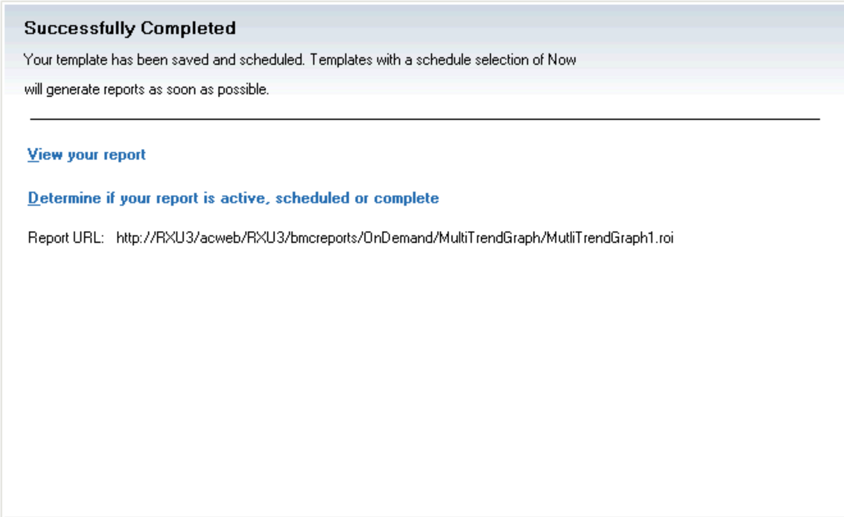
Step 11 On the Schedule tab, set up the schedule to generate the report.

11.A Select the check box for the schedule you want to use to generate the report: **Periodic, Now**, **Once** or **None**.

11.B If you choose **Periodic** or **Once**, select the appropriate times from the drop-down boxes in the Settings area.

11.C Then, select **Finish** to open the Successfully Completed page.

Figure 5-18 QuickReport Editor Successfully Completed Page



Generating Solution Reports

To schedule and generate Solution Reports from the Report Encyclopedia, BMC Software recommends that you use the Actuate Administrator Desktop.

Generating a Solution Report

Summary: This task describes how to generate and schedule a Solution Report in the Report Encyclopedia from a Web browser using the Actuate Administrator Desktop.

Step 1 Log in to the Report Server for your Report Encyclopedia using your Web browser to open the Report Encyclopedia main page.

Step 2 Click **User: anonymous, Log On** to open the Enter Network Password dialog box.

Step 3 Enter the user name and password provided by your administrator and click **OK**. The defaults are:

- **User Name**: patrol
- **Password**: patrol

Step 4 Click the **BMCReports** folder to open the installed folders.

Step 5 Click **Default** to open the **ROV** folder.

Step 6 Navigate to a folder that contains the Report Object Value (**.ROV**) file for the report that you want to schedule and generate.

Step 7 Click the Report Object Value file and select a report to open the Request Report page for the report.

Figure 5-19 Request Report Page

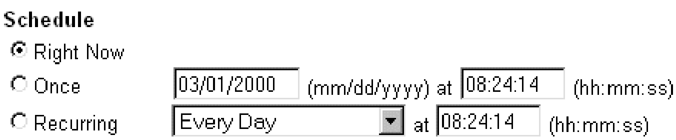
If you want to report on data for a specific date, you must modify the information in the following fields:
Enter the launch method: T
where T = ThisDate_Now
Enter the Date used for This Date_Now: *mm/dd/yyyy*

Note

For a description of the ROV parameters, see Table 1-1, "ROV Parameters Table," on page A-2.

Step 8 Scroll to the Schedule section.

Figure 5-20 Request Report Scheduling Options

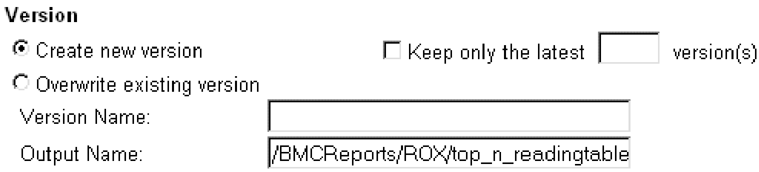


Step 9 In the Schedule section, select the time you want the report to generate: **Right Now**, **Once**, or **Recurring**. The default is to generate a report right now for the last time span. Enter dates and times as required by your schedule selection.Then, scroll to the Priority section of the Request Report page.

Figure 5-21 Request Report Priority Options

Step 10 In the Priority section, set the priority at which to generate the report: **High (800)**, **Medium (500)**, **Low (200)**, or **Other (1-1000)**. This is the priority the server assigns to generating the report, Medium (500) is the default. Scroll to the Version section of the Request Report page.

Figure 5-22 Request Report Version Options



Step 11 In the Version section, select the version information for the report.

11.A Select the **Create new version** or the **Overwrite existing version** option button. The default is to create a new version.

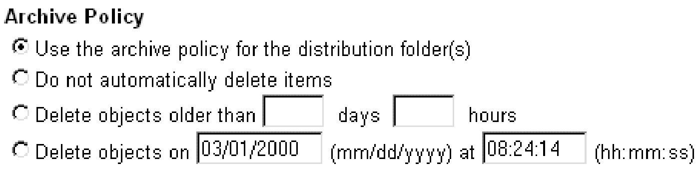
11.B Enter a name for the version in the **Version Name** input box, if you are maintaining versions. A version number is used by default, for example, Version 1 or Version 2.

11.C Enter a full path name in the **Output Name** input box.

Step 12 Scroll down to the Archive Policy section and create archive information for this report.
You can set the Archive Policy to:

- use the default archive policy **- Use the archive policy for the distribution folder(s)**
- never delete the report **- Do not automatically delete items**
- delete a report after a set time period **- Delete objects older than:**
- set a specific date to delete **- Delete objects on:**

Figure 5-23 Archive Policy Options



Step 13 After entering all of your information, click **Submit Request** on the left side of the browser.

Step 14 On the Confirmation page, click **Request Status** to check on the status of your request. To cancel the request, click **Cancel Request**.

You can check on the status of your report by clicking the Active Request folder in the Report Encyclopedia left panel.

Scheduling a Report for Any Date Other Than the Current Date

To run a solution report for a day other than the current date, change the field labeled **Enter the launch method**: to the value **t** and then specify the date in the field labeled **Enter the Date used for ThisDate_Now**:.

See Step 7 on page 5-23 to see the section of the ROV file you must modify.

Locating and Viewing Reports

All reports and report templates are stored in the Report Encyclopedia, part of the Report Store, on a Report Server. To locate and view reports, BMC Software recommends you can use the Reporting Portal. You can also use the Web Desktop. For information on how to:

- use the Reporting Portal, see Chapter 3, “Introducing the Reporting Portal”
- use the Web Desktop, see “Using the Web Desktop” on page 2-5
- access the Report Encyclopedia, see “Using the Report Encyclopedia” on page 2-6
- navigate in the Report Encyclopedia, see “Navigating in the Report Encyclopedia” on page 2-14

Check with your Report Server administrator to see if you can access reports on the Web.

You can also locate and view reports from the Report Encyclopedia using the Actuate Administrator Desktop. For information on locating reports and viewing reports using the Administrator Desktop, see *Viewing e.Reports*, *Using e.Reports*, or the respective application’s online help.

The following sections describe how to locate and view generic reports that you create using the QuickReport Editor and predefined Solution Reports provided by Service Reporting.

Note

When viewing a report using the Web Desktop, the Search function is not available.

Locating and Viewing QuickReports

Service Reporting includes a QuickReport Editor with several QuickReport types. You can choose from these report types to create the report templates you need to manage your enterprise. See “Creating a New Report” on page 5-3 for information on how to use the QuickReport Editor to create a new QuickReport Template.

QuickReports are stored in the Report Encyclopedia. BMC Software provides the top-level folder, **BMCReports** containing a subfolder called **Default**, for the storage of reports and the files that support customized reporting.

Viewing a QuickReport from the Report Encyclopedia

Summary: This task describes how to locate and view a QuickReport in the Report Encyclopedia using the Web Desktop from a Web browser.

Step 1 Open your Web browser and enter the URL for the Report Encyclopedia. (See “Using the Report Encyclopedia” on page 2-6.)

Step 2 Click **BMCReports**. BMCReports contains three subfolders:

- **Default**
- **ROX**
- **zz_SysUtils**

Note

For more information on folders, see “Navigating the Report Encyclopedia with the Web Desktop” on page 2-11.

Step 3 Click **Default**. The Default folder stores QuickReport Report Document files with the associated Parameter Values files (ROVs). Continue to navigate through the BMCReports subfolders until you locate the report that you want to view.

Step 4 Click the folder for the report that you want to view.

Step 5 Click the Report Document for Available Virtual Memory. The QuickReport opens.

Locating and Viewing a Solution Report

Service Reporting provides Solution Reports for the management of a specific technology or application. Solution Reports might provide information on service management, enterprise resource management, or on other requirements specific to the management of a particular application or technology. These reports are stored in the Report Encyclopedia. Solution Reports are available for the Windows NT, Windows 2000, and Unix operating systems and the Microsoft Exchange, Microsoft Exchange 2000, Lotus Domino, and Oracle applications.

Viewing a Solution Report from the Report Encyclopedia

Summary: This task describes how to locate and view a Solution Report in the Report Encyclopedia using the Web Desktop from a Web browser.

Step 1 Open your Web browser and enter the URL for the Report Encyclopedia. (See “Using the Report Encyclopedia” on page 2-6.)

Step 2 Click **BMCReports** to open the **Default**, **ROX**, and **zz_SysUtils** links.

Step 3 Click **Default** to open **Daily**, **Weekly**, **Monthly**, **OnDemand**, and **ROV** links.

Step 4 Click the report type you want to open the available dates.

Step 5 Click the date you want to find the Solution Report that you want to view. You find Solution Reports in top-level folders, Exchange, Exchange 2000, Windows 200, NT, Oracle, Unix, and Lotus Domino.

For example, if you wanted to view reports with information on the Window NT workstations with the highest memory usage in your enterprise, click **Daily**, **<date>**, **NT**, **AvailableBytes**, in succession.

Step 6 Click the Report Document that you want to view. For example, click **MEMmemAvailableBytes19991001** to open the report.

Step 7 Click **Back** in the Web browser’s toolbar to return to the Report Encyclopedia and to locate other Solution Reports that you want to view.

Printing and Distributing Reports

You can print and distribute reports stored in the Report Encyclopedia. Anytime after generating a report, you can use the Web Desktop from your browser to:

- print the report
- save a report as a **.PDF** file

You can also request the printing of a report when you create a request to generate a report in the Report Encyclopedia from the Actuate Administrator Desktop, using the applications's Requester dialog box.

For more information on printing and distributing reports using the Actuate Administrator Desktop, see *Viewing e.Reports*, *Using e.Reports*, or the respective application's online help.

Printing a Report

To print and distribute reports from the Report Encyclopedia, BMC Software recommends that you use the Web Desktop.

Printing Reports from the Report Encyclopedia

Summary: This task explains how to print a report from the Report Encyclopedia using the Web Desktop any time after the report is generated.

Note

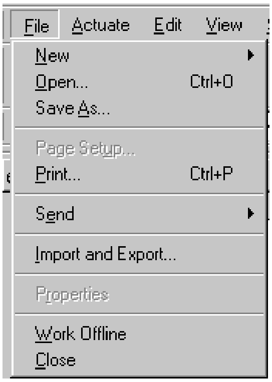
Because printing using the following method may clip portions of your report, BMC Software recommends that you save the report as a **.PDF** file and then print from the .PDF viewer. To do this, click the **Print/Download** link on the Web Desktop and follow the screens to save the report. See your Adobe Acrobat documentation for information on printing a **.PDF** file.

Step 1 Open your Web browser, enter the URL for the Report Server for your Report Encyclopedia, and log in using the user name and password assigned to you.

For more information on accessing the Report Encyclopedia from a browser, see “Using the Report Encyclopedia” on page 2-6.

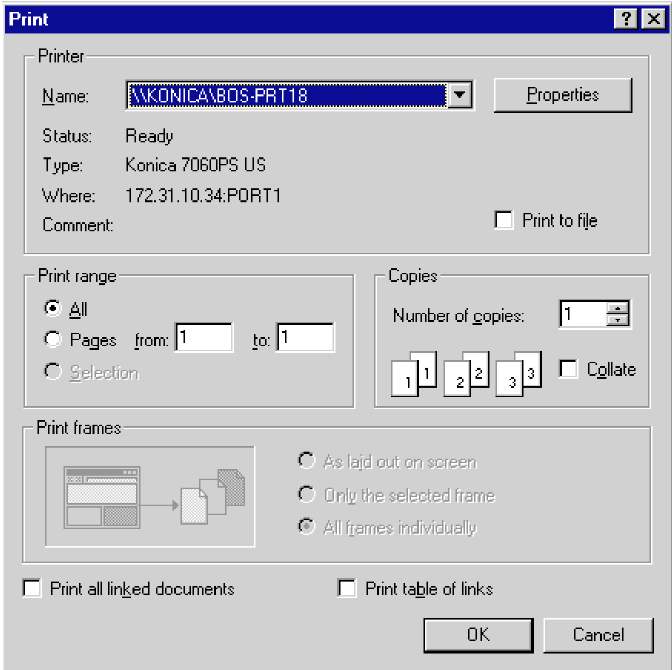
Step 2 Locate and open the report that you want to print. See “Locating and Viewing Reports” on page 5-27.

Figure 5-24 Browser File Menu



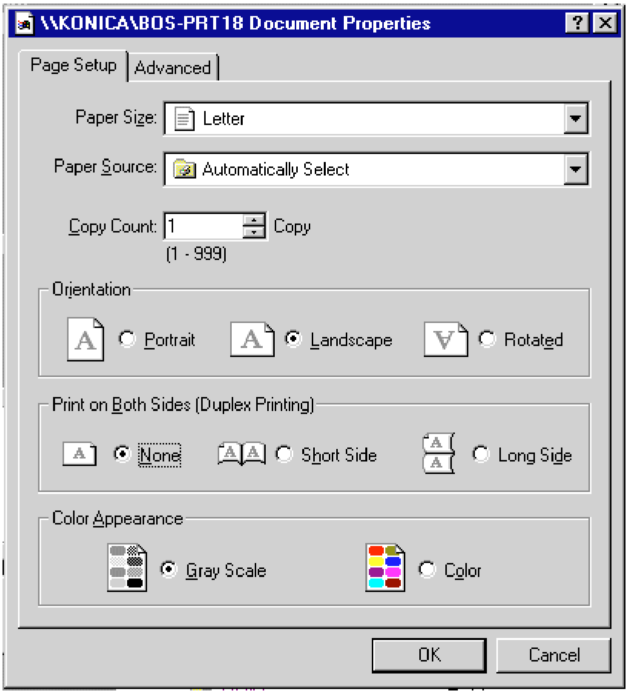
Step 3 With the report in the browser window, choose **File => Print** to open the Print dialog box.

Figure 5-25 Print Dialog Box



Step 4 Click **Properties** to change printer properties, as required, to open the Document Properties dialog box.

Figure 5-26 Printer Properties Dialog Box



Step 5 To avoid possible clipping of your reports, you should reduce the size of your report or change printer properties as required. For example, you might try to change the report size from 100% to 75% and the print orientation to **Landscape**. If you are printing the report on a color printer, you might want to check color options. After selecting printer properties, click **OK**.

Step 6 When the Print dialog box displays again, click **OK** to print the report.

Note

You can also save a report as a **.PDF** file and print from the .PDF viewer. Click the **Print/Download** link on the Web Desktop and follow the screens to save the report. See your Adobe Acrobat documentation for information on printing a **.PDF** file.

6

Working with QuickReports

This chapter describes the QuickReport types included with the Service Reporting product for use with the QuickReport Editor, and explains how to use QuickReports to manage resources in your enterprise.

Overview

Service Reporting provides templates you can use to customize reports to manage the resources in your enterprise. The QuickReport Editor is the tool you use to customize and define the report templates. You can easily transform QuickReport types into the report templates you need by specifying or filling in options in a series of Web pages. You start by selecting a report type with the QuickReport Editor, then choose additional parameters based on the report type.

Describing QuickReport Types

A QuickReport type is a general class of report templates that you can use to define a new report template. To define a new report template, you fill in values in a form, based on the selection of a QuickReport type.

Table 6-1 QuickReport Types (Part 1 of 2)

Report Types	Description
Event Summary Table	Displays a customer-defined number of components and their associated events.
Hot Spots Table	Provides the measurement value of a particular enterprise component for a specified time span of the report and lists the top *n* or bottom *n* values for a measurement or parameter.
Hot Spots Threshold Table	Given a PATROL parameter, list *n* component values where the user-specified threshold was crossed. The time span is specified by the user.
Multi-Quadrant Trend Graph	Displays up to 25 selected parameters as individual line graphs. A maximum of four graphs are displayed per report page.
Summary Graph	Displays *n* number of components with the highest or lowest values of a parameter in bar graph format.
Summary Table	Displays *n* number of components and their associated parameter values, in table format.
Trend Graph	Displays a measurement value of a set of components representing a specific time period. The time span is specified by the user.
Trend Graph (Multi-Parameter)	Displays multiple measurements for multiple components representing a specific time period. The time span is specified by the user.

Table 6-1 QuickReport Types (Part 2 of 2)

Report Types	Description
Trend Table	Displays the measurement value of a set of components representing a specific time period, in table format. The time span is specified by the user.
Trend Table (Multi-Parameter)	Displays multiple measurements for multiple components representing a specific time period. The time span is specified by the user.

Interpreting QuickReports

You create report templates using the QuickReport Editor. This section looks at selected reports you can create by customizing QuickReport types:

- Summary Graph
- Hot Spots

Looking at Summary Graphs

You create a summary graph report by selecting and customizing the Summary Graph template using the QuickReport Editor. Summary graphs present N or fewer components with the highest or lowest values of a parameter. Each of the N components is represented by a bar. The length of the bar represents the value of the parameter. Summary graphs can show daily, weekly, or monthly information for a selected parameter.

Table 6-2 lists the items of the Summary Graph presentation, an example, and the item's origin.

Table 6-2 Looking at the Summary Graph Presentation

Item	Example	Origin
title	Bottom 5 Available Virtual Memory	• selection type—Top or Bottom • selection limit—N selected on the Parameters page (optimum number is five) • label—meaning of the graph entered in input box on Data selection page (Available Virtual Memory)
subtitle	for Fri 1999-Aug-20	date for which the measurements were collected
table caption	Daily Average of Bottom 5 NT Workstation by Available Virtual Memory	• span of the graph—selected on the Parameters page (Daily) • summary type—selected on the Parameters page (Average) • selection type—Top or Bottom (as in title) • selection limit—N selected on the Parameters page • label—component label entered in input box on Data Selection page (NT Workstation) • label—meaning of the graph entered in input box on Data Selection page (Available Virtual Memory)
X-axis	Bottom 5 NT workstation	• selection type—Top or Bottom • selection limit—N selected on the Parameters page • label—component label entered in input box on Data Selection page (NT Workstation)
Y-axis	NT_Memory/MEMmemAvailable Bytes (MB)	• the parameter name—selected on the Data Selection page • the value type—unit label selected on the Parameters page (MB)

Looking at Hot Spots Tables

A reading is a measurement value for a particular enterprise component for a specified subspan within the time span of the report. In the DataStore, each parameter has one reading for each component for each hour of the day. The Hot Spots Table report lists the top N readings for a particular measurement or parameter regardless of when or on which component the top reading occurs.

Table 6-3 lists the items of the Hot Spots Table presentation, an example, and the item's origin.

Table 6-3 Looking at the Top N Hot Spots Table Presentation

Item	Example	Origin
title	Bottom 10 NT CPU Utilization	• selection type—Top or Bottom • selection limit—N selected on the Parameters page • label—meaning of the graph entered in input box on the Data Selection page (NT CPU Utilization) • Readings—set by report type
subtitle	for Week of 1999-Aug-22	date for which the measurements were collected
table caption	Daily Average Readings of Bottom 10 NT CPU Utilization	• span of the graph—selected on the Parameters page (Daily) • summary type—selected on the Parameters page (Average) • Readings of—set by report type • selection type—Top or Bottom (as in title) • selection limit—N selected on the Parameters page • label—meaning of the graph entered in input box on the Data Selection page (NT CPU Utilization)
Component	reporttest1/NT01	node and instance where a top reading was observed—from DataStore
Time	Sun 1999-08-22 12:00:00 AM	subspan interval when reading was observed—from DataStore
Value	55	value of the reading—from DataStore (percent CPU utilization)

Summarizing Enterprise Events and Measurements

To create reports that summarize particular events and measurements on the servers in your enterprise, you can customize the following report templates using the QuickReport Editor:

- Event Summary Table templates

With the summary reports, you can determine the highest or lowest server measurements for Windows NT enterprise-wide parameters, such as the following:

- memory availability
- CPU utilization
- logical and physical disk usage
- cache usage

For a list of Windows NT parameters available for reporting, see the Data Selection page of the QuickReport Editor.

You can customize the summary report templates to investigate Unix server parameters, such as

- available space
- NFS read and write calls
- CPU utilization or load
- memory availability
- busiest disks
- disk reads and writes
- incoming network packets
- user or session counts

For a list of Unix parameters available for reporting, see the Data Selection page of the QuickReport Editor.

If data for Lotus Domino, Microsoft Exchange, Microsoft Exchange 2000, and Oracle is collected and stored in the DataStore, you can use the summary reports to investigate parameters of these applications.

Looking at the top five servers based on the highest or lowest measurements for several parameters can provide information to help:

- plan for redistribution of your enterprise resources
- determine the need for upgrades and replacements
- aid in troubleshooting device problems

You can create the first report based on a summary template, then edit the report as many times as you need to create other similar reports.

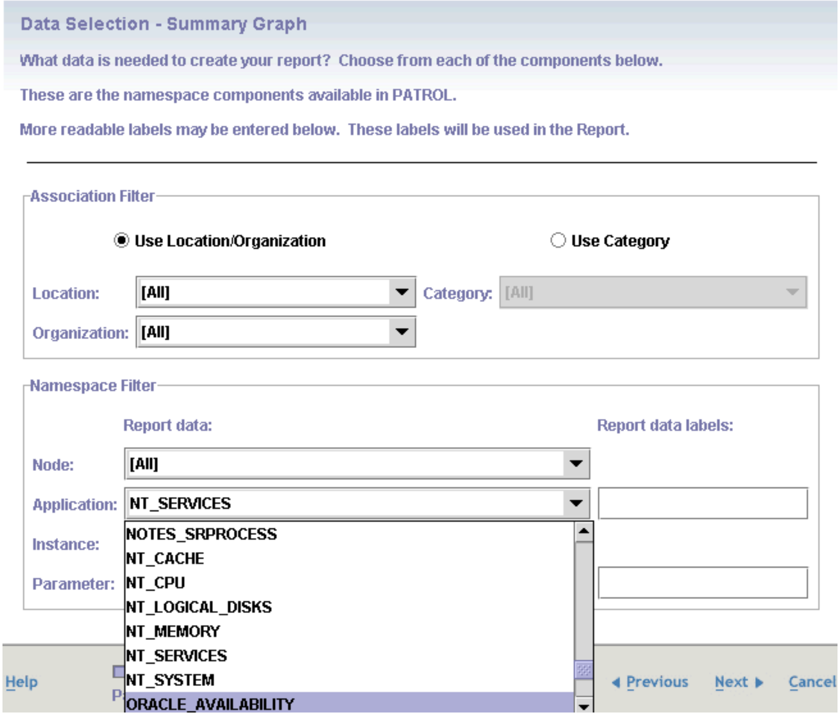
Note

You need to change the file name of each new report template you create, if you want to keep the template. Editing a report template without changing its file name overwrites the report template.

After you select the report type and click **Next** in the QuickReport Editor, the Data Selection page for the selected report type displays. On this page, you find listed all nodes, applications, instances, and parameters available for a report in their respective drop-down list boxes.

Figure 6-1 shows a sample list of application classes available for Top N Summary Graph reports for Windows NT servers. These same application classes are available if you wanted to create a Bottom N Summary Graph, a Top N Summary Table, or a Bottom N Summary Table report.

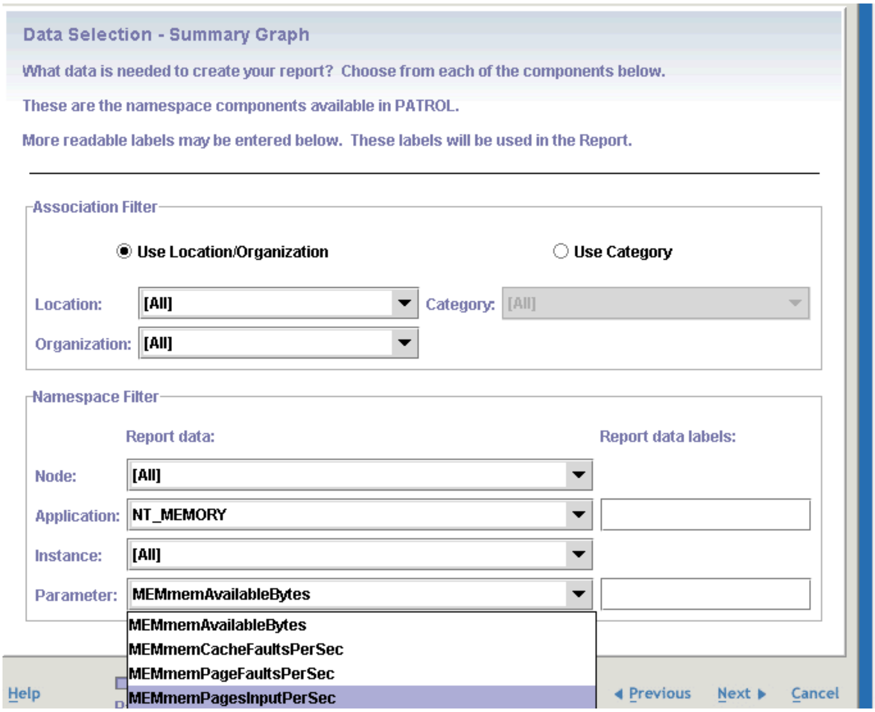
Figure 6-1 Summary Graph Application Classes



After selecting an Application on the Data Selection Criteria - Summary Graph page, for example, **NT_CACHE**, click the **Parameter** drop-down list box to display the parameters for the selected Application.

Figure 6-2 shows a sample NT_Memory application class and the associated parameters available for a report.

Figure 6-2 Summary Graph Windows NT Memory Parameters



Taking a Closer Look at Enterprise Measurements

To create reports that take a closer look at particular measurements on the servers in your enterprise, you can customize the Top or Bottom N Trend Graph templates using the QuickReport Editor. You choose components and parameters for trend graph reports just as you do for summary reports. In the trend graph, the parameter for each of the N components is plotted over the selected span by intervals:

- a daily report is plotted by the hour
- a weekly report is plotted by the day
- a monthly report is plotted by the day

With a trend graph report, you can view the highest or lowest hourly, daily, or weekly server measurements for Windows NT parameters, such as:

- memory availability
- CPU utilization
- logical and physical disk usage
- cache usage
- network usage
- services availability

For a list of Windows NT parameters available for reporting, see the Data Selection Criteria page of the QuickReport Editor.

You can customize the trend report templates to investigate Unix server parameters, such as:

- available space
- NFS read and write calls
- CPU utilization or load
- memory availability
- busiest disks
- disk reads and writes
- incoming network packets
- user or session counts

For a list of Unix parameters available for reporting, see the Data Selection Criteria page of the QuickReport Editor.

If data for Microsoft Exchange and Oracle is collected and stored in the DataStore, you can use the trend graph reports to investigate parameters of these applications.

You can create the first report based on the Top N Trend Graph template, then edit the report as many times as you need to create other similar reports.

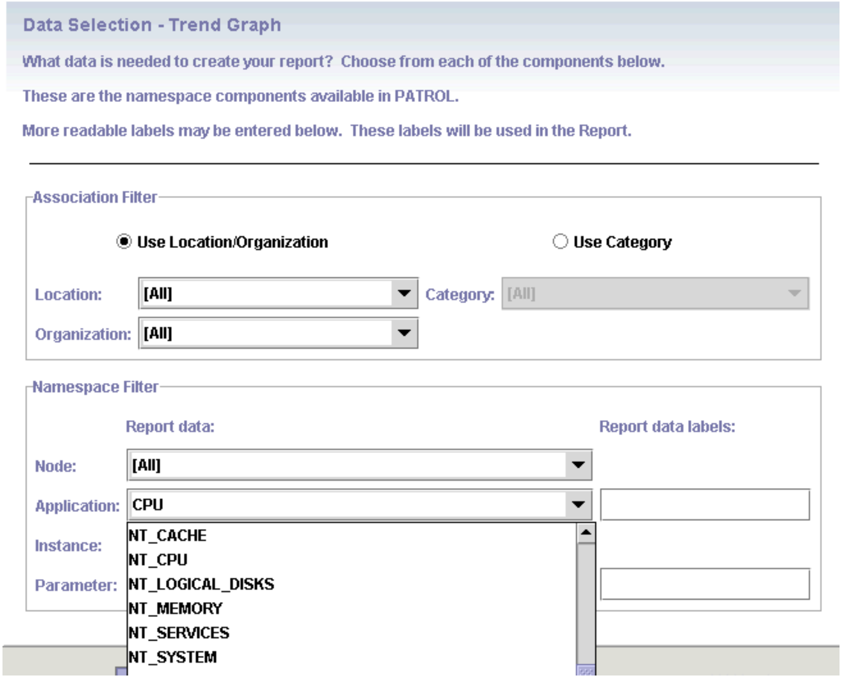
Note

If you edit and run a report without changing the file name, the template will not reflect the changes you made. You need to change the file name of each new report template you create, if you want to keep the template. Editing a report template without changing its file name overwrites the report template.

After you select the report type and click **Next** in the QuickReport Editor, the Data Selection Criteria page for the selected report type displays. On this page, you find all nodes, applications, instances, and parameters available for a report in their respective drop-down list boxes.

Figure 6-3 shows a sample list of application classes available for Trend Graph reports for Windows NT servers.

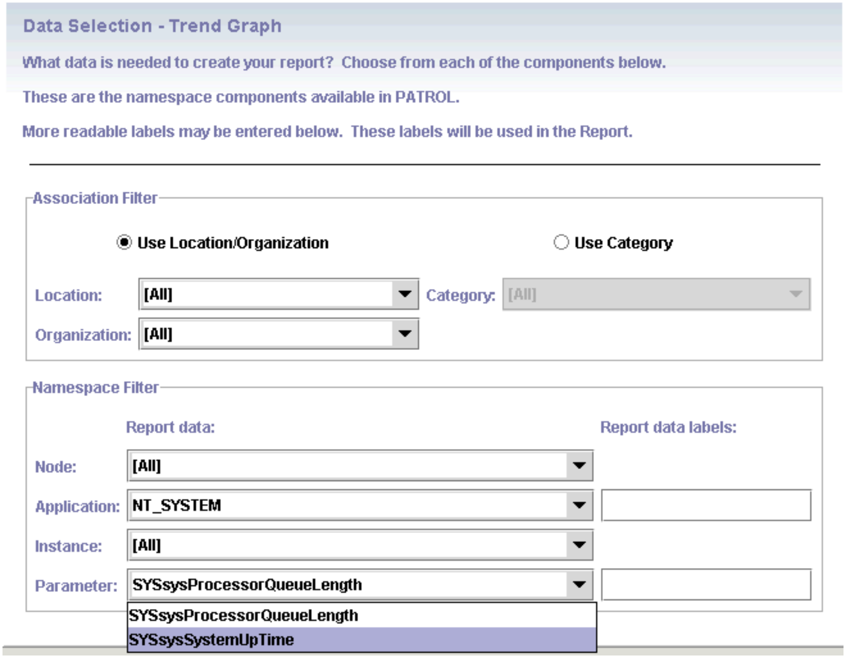
Figure 6-3 Trend Graph Application Classes



After selecting an Application on the Data Selection Criteria - Top N Trend Graph page, for example, **NT_SYSTEM**, click the **Parameter** drop-down list box to display the parameters for the selected Application.

Figure 6-4 shows a sample NT_SYSTEM application class and the associated parameters available for a report.

Figure 6-4 Trend Graph Parameters



Locating Enterprise Hot Spots

To create reports that highlight enterprise hot spots, you use the QuickReport Editor to customize either of the following report templates:

- Hot Spots Table templates
- Hot Spots Threshold Table templates

The hot spot reports show the highest or lowest readings for a subspan for the selected parameter regardless of which server or when the reading occurs. The threshold hot spot report lists only those component-interval pairs that cross the specified threshold.

For the selected parameter you can create:

- a daily report listing hourly hot spots
- a weekly report listing daily hot spots
- a monthly report listing daily hot spots

Parameters available for hot spot reporting for Windows NT memory include:

- available bytes
- cache faults per second
- page faults per second
- pages input per second
- pages per second

For a list of Windows NT parameters available for reporting, see the Data Selection Criteria page of the QuickReport Editor.

Parameters available for hot spot reporting for Unix servers include:

- space availability
- percentage of NFS read and write calls
- CPU utilization
- CPU load
- memory availability
- busiest disks
- disk reads and writes

- incoming network packets
- user or session counts

For a list of Unix parameters available for reporting, see the Data Selection Criteria page of the QuickReport Editor.

If data for Lotus Domino, Microsoft Exchange, and Oracle is collected and stored in the DataStore, you can use the hot spot reports to investigate parameters of these applications.

You can use the Hot Spot Reports as a troubleshooting tool to locate problems before they cause server downtime.

You can create the first report based on the Hot Spots Table template or the Hot Spots Threshold Table template, then edit the report as many times as you need to create other similar reports.

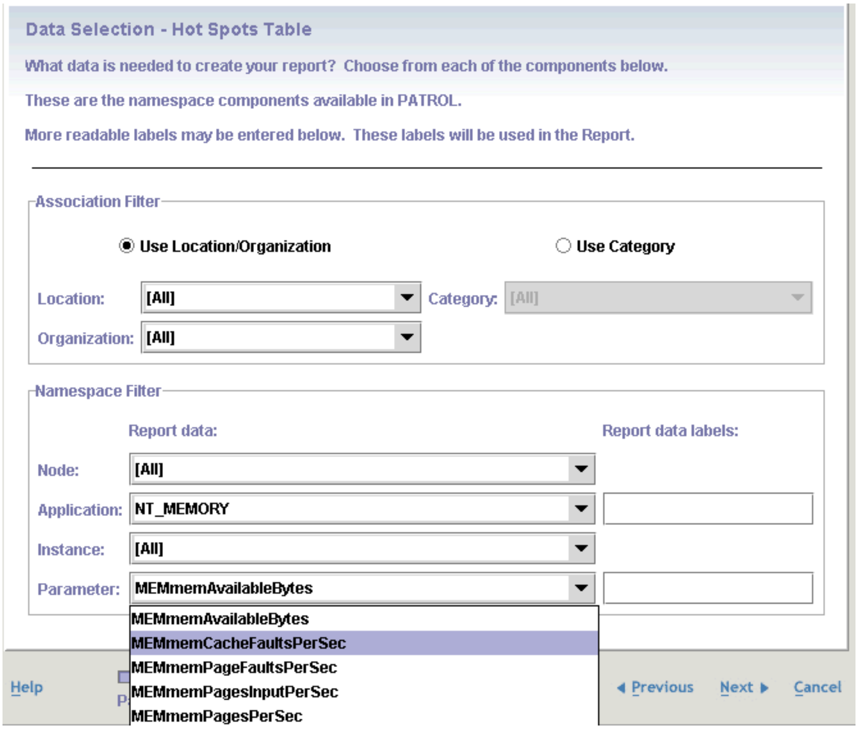
Note

If you edit and run a report template without changing the file name, the template will not reflect the changes you made. You need to change and save the file name of each new report template you create, if you want to keep the template. Editing a report template without changing its file name overwrites the report template.

After you select the report type and click **Next** in the QuickReport Editor, the Data Selection Criteria page displays. On this page, you find listed the applications and parameters available for these reports in their respective drop-down list boxes.

Figure 6-5 shows a sample list of application classes available for Hot Spots Table reports for Windows NT servers. The same application classes are available for a Bottom N Hot Spots Table report and Top and Bottom N Hot Spots Threshold Table reports.

Figure 6-5 Hot Spots Table Application Classes



A

ROV Parameters

This appendix lists the ROV parameters, the corresponding ROV field name, the parameter value, and a description.

ROV Parameters

Table 1-1 This appendix lists the ROV parameters, the corresponding ROV field name, the parameter value, and a brief description.

Table 1-1 ROV Parameters Table

ROV Parameter/ ROV Field Name	Value	Description
p_LaunchMethod/ Enter the launch method:	String	The value is interpreted by the report executable at start time. (The values are case insensitive and the italics indicate the optional part of the string.) 1) L*astSpan_NOW*: [Default] • The report is scheduled for immediate execution. • The report's time span is based on the current clock time. At startup, the report calculates the latest complete time span earlier than the current time (adjusted by GMT offset). 2) T*hisDate_NOW*: • The report is scheduled for immediate execution. • The report's time span is the latest span that starts earlier than p_ThisDate, and ends on or later than p_ThisDate. 3) N*extSpan_HIST*: • The report is scheduled to run periodically, unattended. • The report's time span is the one just after the last recorded span. • After execution, the last recorded span advances by one period.
p_ThisDate/ Enter the Date used for ThisDate_Now:	Date	Specify a value in this field if you specify ThisDate_Now as the launch method.
p_ConfigFile/ Enter Config File Path:	String	Specify the full path name to the configuration file.

ROV Parameter/ ROV Field Name	Value	Description
p_ROIScheme/ Enter the ROI scheme:	String	The ROI scheme is the file naming convention of the output file. Specify one of the following as the ROI scheme. (The values are case sensitive and the italics indicate the optional part of the string.) • D*efault*: the ROI path is determined by the launch method. • I*mmediate*: use the naming scheme defined for immediate execution outputs. • U*nattended*: use the naming scheme defined for unattended execution outputs. • T*hisPath*: use the path specified in p_ThisPath.
p_ThisPath/ Enter the ROI path:	String	Specify the ROI path here if you specify ThisPath as the ROI scheme.

Glossary

Actuate Live Report Extension (LRX)
A Web browser plug-in that an end user can use to find, view, and print reports (not generate reports) accessed over the Internet.

Administrator Desktop
Component of Service Reporting used to manage the Report Server. Using the Administrator Desktop, you can add or remove report executables and documents, generate reports, set and maintain user information, and configure security for report server resources.

aggregator
A component that compiles the information collected from one or more retrievers and stores the data in the DataStore as raw and summarized data. *See* data aggregator

associations
A way to classify related namespace data (application classes, application instances, and parameters) used for a common purpose. Data can be associated by location, organization, and category.

component
The subject of a measurement or event. Examples in PATROL include, an Oracle database instance; a host running a Windows NT server.

data aggregator A data aggregator receives event and parameter data from retrievers and forwards that data to the DataStore. Data aggregators control the DataStore's summarizing activities, normalize and synchronize time values between different data sources, control and monitor a retriever's status, and downloads configuration parameters to a retriever.

data summarization A process that converts raw data located in the DataStore into summary data. When raw data is converted, it is organized into the summary time periods of hourly, daily, weekly, and monthly summary values of maximum, average, sum, standard deviation, and variance. The summarized data is then used in the QuickReport Editor and Solution Reports.

DataStore The DataStore is the database used by Service Reporting to store parameter and event data collected from your PATROL environment. The database stores raw data, measurement values, and time-summarized measurements. Time-summarized measurements are the inputs to reports.

DataStore Console The DataStore Console is the graphical user interface (GUI) for the DataStore. With the DataStore Console, you can determine what data is collected, as well as monitor and maintain aggregators and retrievers.

DataStore KM The knowledge module (KM) that Service Reporting uses to configure and monitor DataStore components, including data aggregators and retrievers. The DataStore KM lets you configure local or remote data aggregators and retrievers, as well as start, stop, and monitor the current status or performance of these components. *See* Knowledge Module (KM).

drill down While viewing a report, the ability to view the same information in more detail as part of the same report.

dump_hist utility A command line utility that lets you save parameter history data from databases on PATROL Agents to ASCII text files.

enterprise All the components, measurements, and events in the PATROL Datastore valid for a given time.

enterprise view

A subset of the components, measurements, and events stored in the DataStore for a given time span. Examples include:

- all Windows NT nodes located in Houston and their KM parameter values for yesterday
- all Microsoft Exchange servers on nodes whose name starts “hou” and their Exchange KM parameter TotalMsgSize averaged daily for the last week

event filter

Created in the DataStore Console, an event filter controls the collection of event data. Criteria an event filter may contain includes type, status, and severity. An event filter lets you collect information, state change, error, and warning events.

event retriever

A component that collects data when an event matches criteria specified in the event filter. Once the event occurs, the event retriever forwards the raw event data to the data aggregator.

filters

A filter is used to determine what information is collected. Service Reporting uses the following filters:

- history filters—collect parameter information
- event filters—collect event information

generic report

A presentation (graph, table, or chart) generated by specifying parameters, selection criteria, and labels using the QuickReport Editor.

history filter

A history filter lets you specify what parameter data is collected from a PATROL Agent. Parameter data you can collect depends upon the KMs installed on the agent being queried. Once defined, you must add the history filter to at least one history filter group before it can start gathering parameter data. *See* history filter group.

history filter group

A history filter group is the mechanism that forwards history filter settings to the data aggregator. The data aggregator sends the history filter settings to a retriever, which uses the settings to determine what data to collect. All history filters must belong to one or more history filter groups.

history retriever

A process that collects parameter information from an agent's local cache.

initialize

To provide a set of definitions and instructions to be used as a starting point for a component or executable. Usually, you can redefine these settings at any point.

instance

A computer or discovered application that is running in the PATROL-managed environment. An instance has all the attributes of the class that it belongs to. A computer instance is a monitored computer that has been added to the PATROL Console. An application instance is discovered by PATROL. *See* associations.

interval type

The time unit, for example hour, day, week, month, and year.

KM

See Knowledge Module (KM).

KM list

A list of KMs to be loaded by a PATROL Agent. *See also* Knowledge Module (KM).

KM tree

A feature of PATROL for Windows NT only. One of two views of folders available in Windows NT. The KM tree displays computer classes, application classes, and their customized instances in the knowledge hierarchy and also displays the Standard Event Catalog. A PATROL Operator Console can only view the KM tree; only the PATROL Developer Console can change KM properties and attributes. *See also* Knowledge Module (KM).

Knowledge Module (KM)

A set of files from which a PATROL Agent receives information about resources running on a monitored computer. A KM file can contain the actual instructions for monitoring objects or simply a list of KMs to load. KMs are loaded by a PATROL Agent and a PATROL Console.

KMs provide information for the way monitored computers are represented on the PATROL Desktop, for the discovery of application instances and the way they are represented, for parameters that are run under those applications, and for the options available on object menus. A PATROL Developer Console can change KM knowledge for its current session, save knowledge for all of its future sessions, and commit KM changes to specified PATROL Agent computers. *See also* KM list, KM tree, and load KMs.

load applications

Same as load KMs; most KMs are composed of application files with a `*.kml` extension.

load KMs

To place KM files into memory for execution. After configuration and during startup, the PATROL Agent loads the KM files that are listed in its configuration file and that reside on the PATROL Agent machine. When a PATROL Console connects to the PATROL Agent, the KM versions that the Agent executes depend on whether the Console is an Operator Console or a Developer Console. *See also* Knowledge Module (KM).

local history

The history (stored parameter values) for an object or instance.

local history retention period

The user-defined length of time during which stored parameter values for an object or instance are retained.

manual collection

Lets you start or stop collection of parameter data regardless of the settings in a history filter. Manual collection lets you be very specific about what data is or is not collected. Once you use manual collection, those settings remain in effect until you clear them.

open data retriever

Process that reads a comma separated value file and lets you load `dump_hist` data into the DataStore. *See* retrievers

Publisher Server

The Publisher Server provides access to the Report Store for storing new report documents and for selecting report document aging policies. It also provides the link from Visualizer to the Reporting Portal, generating reports with Visualizer data.

QuickReport Editor

A graphical user interface that you can use to create new reports based on generic report templates to meet your management reporting requirements. A series of dialogs help you define the input parameters for your report.

QuickReport Template

One of several report definitions or templates that a user can select to generate a specific report. The definition includes

- a visual presentation and a list of parameters that control the presentation
- a family of content and a list of required parameters to specify the content

For example, the top/bottom N summary graph defines the visual presentation as a bar graph and defines the input as at the most N rows of data, sorted in ascending or descending order.

report

Generated presentations (graphs, tables, or charts) based on stored PATROL event and parameter data that you can view remotely using a Web browser on supported platforms.

report consumer

Person who locates, runs, schedules, and views report documents.Typically, this person is a manager or senior IT professional in charge of managing a portion of the enterprise infrastructure.

report composer

Person who creates schedules and runs report templates, creates new report templates, and ensures that the necessary data is being collected. Typically, this person is a technical IT professional who needs certain kinds of PATROL information to appear in reports.

Report Server

A component of Service Reporting that is used to control access to reporting data. With the report server, you can:

- manage users request (on-demand reports with run-time parameters)
- control the report encyclopedia and validate users and requests
- generate report instances
- print reports
- manage persistent objects, such as report instances, folders, users, and roles

report store administrator

A person who installs and sets up components, and periodically cleans up the report store/encyclopedia (removes or archives old reports, removes unused report templates, and the like).

report template

Report templates (RTs) are definitions for Service Reporting that direct Service Reporting to extract data from the DataStore for a given time span and generate a presentation in the form of a graph, table, or chart.

Reporting Portal

The Reporting Portal is a common Web application that provides a unified view of the report documents in the Report Store. Report consumers use it to navigate and search for reports through common Web browsers.

The Reporting Portal opens up Service Reporting tools and storage to other applications including:

- Solution Reports
- QuickReport Editor (QRE)–generated reports
- PATROL for Service Level Manager reporting
- Visualizer

retrievers

Components that compile, filter, and forward agent data to an aggregator. Aggregators send filter settings to the retrievers that specify which parameter data and event data to collect. Service Reporting includes the following types of retrievers:

- History Retriever—collects parameter data from an agent's local cache
- Event Retriever—collects event data
- Open Data Retriever—reads a comma separated value file and lets you load `dump_hist` data into the DataStore

ROI files

Report document files. The reports that you view and print. ROI files are stored in the Report Encyclopedia. You can use the End User Desktop or the Administrator Desktop to create report document files.

ROV files

Parameter value files. The files that store parameter values specified for a specific report executable. The values in the file filter the data for a report document. You use a parameter values files to generate a report with a specified set of criteria.

ROX files

Report template executable files. The files that you execute to generate report documents with current data.

Solution Reports

A package of report templates created for the management of a particular technology or application. The reports require little or no user setup.

time span

A particular interval defined by its interval type and start time, for example, week of October 10, 1999.

time span type

For simple time spans, the interval type. For nested time spans, the interval type and number of sub-intervals, for example, weekly span shown as 168 hours.

Web Desktop

Component of Service Reporting that provides access to reporting. Using the Web Desktop, you can view contents of the Report Encyclopedia, create your own reports with the QuickReport Editor, and generate, schedule, locate, view, print, and distribute reports.

Windows NT Viewer

On Windows NT platforms, an application that an end user can use to print and view reports.

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