

# Precise Report Manager basics

This section includes the following topics:

- [Introducing the Report Manager user interface](#)
- [How the Report Manager tab is structured](#)
- [Tasks common to most tabs](#)
- [About role management in Report Manager](#)
- [Launching Report Manager](#)

## Introducing the Report Manager user interface

Report Manager is a Web-enabled application. This means that you do not need to install any special software on your desktop to use Report Manager. Instead, the application opens in a browser.

Because Report Manager is Web-enabled, you can access it from almost any location that is connected to the World Wide Web as long as you can access your Report Manager server.

 Although Report Manager opens in a browser window it is important to understand that it is an application rather than a Web site. To perform activities within Report Manager, use the Report Manager controls, not your browser controls. Do not open information in a New Window, and you should not use the Back or Refresh hot-keys. Use the Precise bar instead.

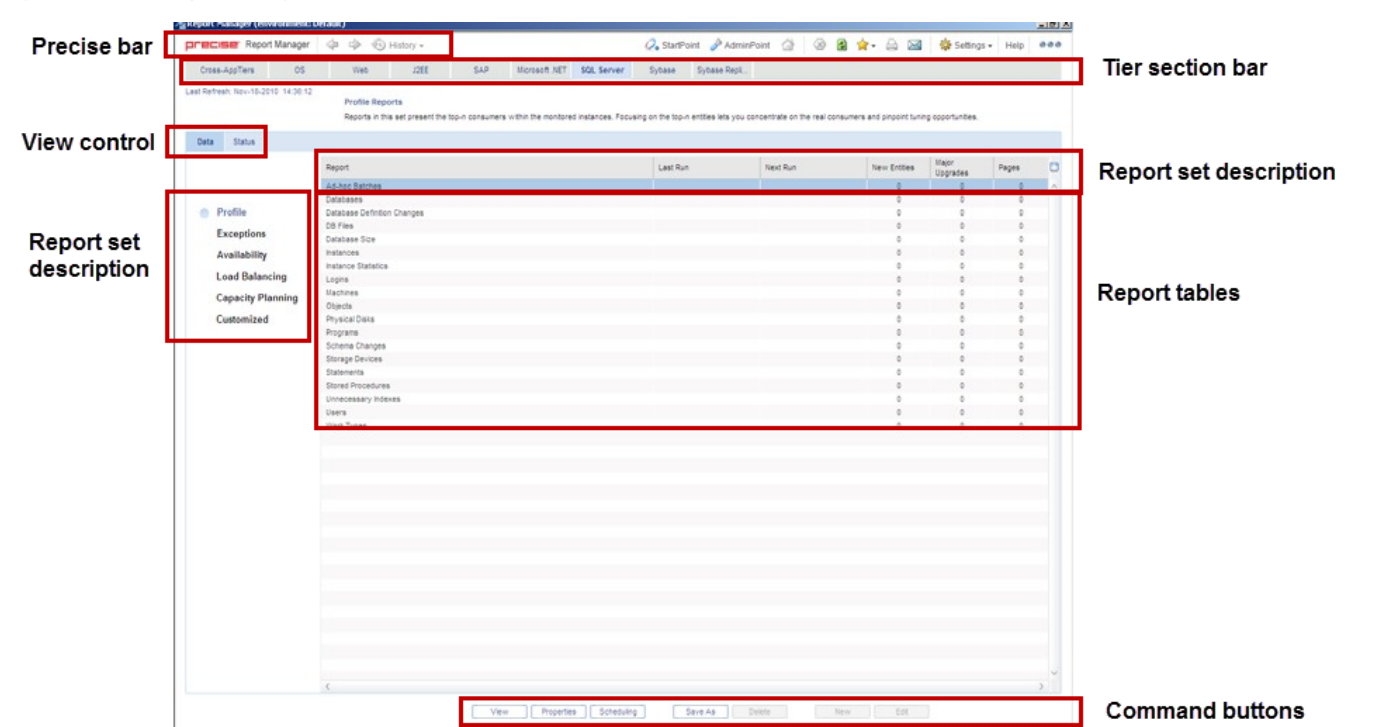
## How the Report Manager tab is structured

Report Manager user interface consists of one main screen from which you can access the various Tier tabs. Report Manager main screen includes the following elements:

- [About the Precise bar](#)
- [About the Tier selection bar](#)
- [About the View control](#)
- [About the Report set selector](#)
- [About the Report set description](#)
- [About the Reports table](#)
- [About the Data view](#)
- [About the Status view](#)
- [About the Command buttons](#)

The following figure describes the Report Manager user interface elements.

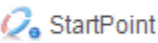
**Figure 1** How the Report Manager tab is structured



## About the Precise bar

The Precise bar enables you to keep track of where you have been and provides various controls. The following table describes the function of each of the toolbar buttons

**Table 1** Precise bar functions

| Icon                                                                                | Name                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Backward                  | During a work session, keeps track of where you have navigated to. The Back button enables you to navigate between previously visited views.<br><br>The Back control displays your previous view.                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|    | Forward                   | Enables you to navigate to the next view. This button is only enabled if you clicked Back or if you chose a history option.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|    | History                   | The History control displays your navigation paths signifying the various views you have already visited. Choose a navigation path from the pull-down menu to display a previous view.<br><br>The history does not record changes to the selected view or tab. For example, in the Current tab, if you have an instance selected as the entity in the Main area and you change the association area from Active applications to Applications and then click the Back button, you will not be taken back to see the Active Applications. Instead, you will be taken back to see the previous entity in the Main area, which may be in a different tab. |
|    | StartPoint                | Launches Precise StartPoint from your current Precise product. You can launch any Precise product from StartPoint.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|    | AdminPoint                | Launches Precise AdminPoint.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|    | Home                      | Navigates to the highest level entity, usually the instance or Tier (all instances). The time frame settings remain the same.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|  | Stop                      | Stops a request for information from the server.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|  | Refresh                   | Updates the data currently displayed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|  | Favorites                 | Enables you to add or remove favorites in your Favorites list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|  | Print                     | Opens the Print Option dialog where you can select the area of the screen you want to print.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|  | Settings                  | Opens the General Settings and Time Frame Settings dialog boxes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|  | Actions                   | Depending on the tab you are viewing, it lets you perform different actions, including editing an existing statement or saving a statement with a new name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|  | Send                      | Opens a new email message in your email program with the link to the current application in context.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Help                                                                                | Help                      | Opens the online help in context.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|  | Communications Indicators | Indicates whether or not the client is communicating with the server. Moving the cursor over this icon displays a ToolTip indicating the GUI server and port number.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## About the Tier selection bar

Report Manager collects information and generates reports about the various Tiers in your application. The Tier Selection bar contains a button for each of these Tiers. When you select an Tier, Report Manager displays information relevant for that particular Tier in the tab. You can switch from one Tier to another at any time using these buttons. In addition, the Tier Selection bar contains the Cross-Tiers button that enables you to display high-level view of your application and generate integrated reports of more than one Tier.

### About the View control

The View Control enables you to select the view of the Reports table. The following two views are available:

- **Data view.** Displays the reports list with statistical information about the report, such as the last run date of the report and number of pages in the report. See [About the Data view](#).
- **Status view.** Displays the reports list with status information about the report, such as last run date and error description. See [About the Status view](#).

### About the Report set selector

Report Manager reports are grouped into six different sets as follows: Profile, Exceptions, Availability, Load Balancing, Capacity Planning, and Customized. When you select a report, Report Manager displays its assigned reports in the Reports Table.

In Cross-Tiers area, the Report Set selector is dimmed because the Cross-Tiers reports are assigned to a single report set.

### About the Report set description

A short description of the report set, including few statistical information, which summarize the data available in the reports.

### About the Reports table

The Reports Table, which is the main area of the user interface, contains a list of Report Manager reports that are assigned to the selected Tier and report set.

The Reports Table also displays statistical information according to the selected view: Data or Status.

### About the Data view

In the Data view, the Reports Table shows a list of reports with statistical information displayed for each report. The statistical information includes columns that are common to all reports and additional columns that are specific to the selected report set.

 The Customized reports set includes only the common columns: Report, Last Run, Next Run, and Pages.

The following table describes the information displayed in all reports.

**Table 2** Information displayed in the Reports table

| Column   | Description                                                           |
|----------|-----------------------------------------------------------------------|
| Report   | Specifies the report name.                                            |
| Last Run | Specifies the last time and date of generating the report.            |
| Next Run | Specifies the next scheduled time and date for generating the report. |
| Pages    | Specifies the number of pages in the report.                          |

The following table describes the information that is specific to a specific report set.

**Table 3** Information displayed according to specific report

| Column  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profile | Reports in this set present the top n consumers within the monitored instances. Focusing on the top n entities lets you concentrate on the real consumers and pinpoint tuning opportunities. The following information is displayed in the Profile column: <ul style="list-style-type: none"><li>• <b>New Entities.</b> Specifies the number of new entities in the Profile report. Entities are considered as new entities if they do not have a baseline or they are new in the top n entities list.</li><li>• <b>Major Upgrades.</b> Specifies the number of entities that were upgraded by more than four places in the report.</li></ul> |

|                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exceptions        | <p>This set of reports is intended to help you keep your application tuned. Any substantial deviation from normal behavior is reported. The following information is displayed in the Exception column:</p> <ul style="list-style-type: none"> <li>• <b>Exceptions.</b> Specifies the number of exceptions in the report.</li> <li>• <b>New Entities.</b> Specifies the number of new entities in the report. Entities are considered as new entities if they do not have a baseline.</li> <li>• <b>Deviation (Avg).</b> Specifies the average deviation from the baseline in the report.</li> <li>• <b>Deviation (Max).</b> Specifies the maximal deviation from the baseline in the report.</li> </ul> |
| Availability      | <p>This set of reports informs you about failures, unavailability times, and similar events. The following information is displayed in the Availability column:</p> <ul style="list-style-type: none"> <li>• <b>Availability (Avg).</b> Specifies the average availability percentage of the entities in the report.</li> <li>• <b>Availability (Min).</b> Specifies the minimal availability percentage of the entities in the report.</li> </ul>                                                                                                                                                                                                                                                       |
| Load Balancing    | <p>Reports in this set are intended to help you keep your application balanced. The following information is displayed in the Load Balancing column:</p> <ul style="list-style-type: none"> <li>• <b>Machines.</b> Specifies the total number of machines in the report.</li> <li>• <b>Overloaded.</b> Specifies the number of machines that were overloaded.</li> </ul>                                                                                                                                                                                                                                                                                                                                 |
| Capacity Planning | <p>These reports analyze the performance of the monitored instances to predict future trends and assist in planning. The following information is displayed in the Capacity Planning column:</p> <ul style="list-style-type: none"> <li>• <b>Increase.</b> Specifies the additional consumption (%) that is predicted in the report.</li> <li>• <b>Forecasted Weeks.</b> Specifies the number of weeks included in the forecast.</li> </ul>                                                                                                                                                                                                                                                              |
| Customized        | <p>This set contains new user-defined reports and copies of reports from other sets. The customized reports include data that is not provided in the pre-defined reports.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## About the Status view

In the Status view, the Reports Table displays a list of reports along with their corresponding status information. The following table describes the information displayed in the Reports table in the Status view.

**Table 4** Information displayed in the Reports table in the Status view

| Column   | Description                                                                                  |
|----------|----------------------------------------------------------------------------------------------|
| Report   | Specifies the report name.                                                                   |
| Last Run | Specifies when Report Manager started generating the last report.                            |
| Duration | Specifies how long it took Report Manager to generate the last report.                       |
| Error    | Provides a description of the error that occurred while the report was last being generated. |

Clicking Details or double-clicking on the selected report displays the status details of the selected report.

## About the Command buttons

The Command buttons enable you to enable various functions for each report, such as opening the properties page or viewing its scheduling parameters. The following table describes the functions that can be carried out for each report.

**Table 5** Command buttons

| Column     | Description                                                                                                                                                                  |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View       | Displays the content of the selected report. See <a href="#">Viewing a report</a> .                                                                                          |
| Properties | Opens the Properties dialog box of the selected report. See <a href="#">Setting report properties</a> .                                                                      |
| Scheduling | Opens the Scheduling dialog box, which enables you to select the schedule for running the selected report. See <a href="#">Setting the schedule of a report generation</a> . |
| Save As    | Opens the Save As dialog box, which enables to create a copy of the selected report. See <a href="#">Creating a copy of a selected report</a> .                              |
| Delete     | Deletes a selected report that is not original of Report Manager. For example, a new customized report or a Saved As report.                                                 |
| New        | Creates a new customized report (this option is only available for the Customized reports set or the Cross-Tiers tab). See <a href="#">Creating customized reports</a> .     |

|      |                                                                                                                                                                |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | This button enables to edit an existing customized report (available only for customized reports). See <a href="#">Editing an existing customized report</a> . |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Tasks common to most tabs

The following tasks are commonly performed in most tabs:

- [Exporting to the Precise Custom Portal](#)
- [Adding, viewing, and deleting Favorites](#)
- [Printing and saving](#)
- [Sending an email message](#)

## Exporting to the Precise Custom Portal

The Export to the Precise Custom Portal Portlet feature enables you to export the view of the chosen table or graph and generate a portlet with that view in the Precise Custom Portal, so that it will provide you with another way of monitoring your application.

### Prerequisites

To be able to use this feature, you need to have the following rights in Precise:

- View permissions to all Tiers in the application

If you do not have sufficient rights, you will get an error message when trying to execute this feature.

### Exporting the information

You can either export a table view or a graph view.



The name field has the following restrictions: maximum 100 characters.

To export a table view

1. Click the Column Chooser icon.
2. Select **Export to the Precise Custom Portal Portlet**.
3. Insert a name in the name field that clearly describes the table view.
4. Click **OK**.

To export a graph view

1. Right-click the graph.
2. Select **Export to the Precise Custom Portal Portlet**.
3. Insert a name in the name field that clearly describes the graph view.
4. Click **OK**.

## Adding, viewing, and deleting Favorites

The Favorites feature enables you to save a specific location in Precise and to retrieve the same location later without having to navigate to it.

### About the Favorites feature

The new Favorites feature includes the following option:

- **Relative Time Frame.** Saving relative time frame instead of static date. For example, saving the last seven days will always display the last seven days, depending on the day entered.
- **One click to specific location.** Once you open Precise by launching a saved Favorite item, you will not have to enter a login credential nor click the login button.
- **IE Favorites support.** Adding a new Favorite item in Precise will also add it to the IE Favorites menu.
- **Auto Complete.** The Favorites dialog includes a new combo box which supports Auto Complete.
- **Auto Naming.** The Favorites dialog generates item names based on the current location.

### UI description

A Favorites menu has been added to the Precise bar in each product including StartPoint. An Add/Delete Favorites option under the Favorites menu allows you to save the current location or delete an existing one.

To add a new Favorite location

1. On the Add/Delete Favorites dialog box, enter the name of the new Favorites entry.
2. Click **Add**. The dialog box is closed and the new Favorite is added to the list.

To view a Favorites location

1. On the Precise bar, click **Favorites**.
2. Select the Favorites location you want to view.

To delete an existing Favorite location

1. On the Add/Delete Favorites dialog box, select the Favorite location to be deleted.
2. Click **Delete**. The dialog box closes and the selected Favorite is deleted from the list.

 The favorite address is displayed in the Address field and cannot be edited.

## Printing and saving

The new Print feature enables user-friendly printing and/or saving of most of the screens displayed in Precise products. Emphasis has been made on Activity, Dashboard, and Database layouts since they cover the majority of the screens the user may want to print or save.

### About the Print feature

The new Print feature includes the following options:

- Capability to export a page from Precise to an .htm format (Save option). The saved file will include all the information contained the original file but all mouse options will be grayed-out except for the Print option.
- Capability to save the print page to the local disk.
- User-friendly and resizable print functionality.

 The Save option is only possible within the same network of the installation. When used outside the network it may include broken links to images (instead of the image a frame with an X may be displayed).

### Recommended print settings

For best fit and presentation we highly recommend you make the following changes to your print settings:

- Configure print options to landscape page layout.
- With the Internet Explorer open, go to Tools > Internet Options > Advanced tab, and in the Printing section verify that the Print background colors and images check box is marked.

To print wide tables with many columns, resize table columns to fit the landscape layout. Columns that overflow the landscape width will not be printed.

Additional information

- Note that when saving a file with a graph, the graph image is saved as a separate .bmp file in the same folder. If you want to move the print file to a different folder you must also move the bmp file to that folder.
- New files are saved with a default name and path. To prevent inadvertently deleting a previously saved file, enter a different name and/or path for new files.

To print, save, or preview a currently displayed screen

1. Click **Print** on the Precise bar.
2. In the Print Option dialog, select the area(s) of the screen you want to print or save.
3. Click **OK**.
4. On the resizable preview screen, the dashed line on the right indicates the right margin. Change table column widths to ensure the information you want to print or save is within this margin.
5. Click the **Print** or **Save** icon at the top right-hand side of the screen, follow the displayed dialog box instructions and click **Print** or **OK**.

## Sending an email message

You can send an email message to one or more recipients from the Precise toolbar. The default subject for the message will be "Link to a Precise application."

The email will include a link to the Precise product in the current context (time frame and selected entries). To send an email message

1. Click the email icon on the Precise toolbar. The default email program opens.
2. Fill in the required fields and click **Send**.

## About role management in Report Manager

Use the role MONITOR.VIEW to view reports and MONITOR.FULL to manage reports.

## Launching Report Manager

You can launch Report Manager user interface from the Precise StartPoint. The StartPoint is the opening screen, which provides a quick status overview of your application and start points for launching other Precise products.

You can also launch Report Manager for a specific Tier to display data in context with the specified Tier.

Report Manager displays information about the application selected on the StartPoint screen. If you use the Precise product suite to manage the performance of more than one application, verify that you select the required application within StartPoint before starting Report Manager.



You must have local administrator privileges on the server where the StartPoint is running.

To launch Report Manager from StartPoint, click the Application TPM drop-down menu at the top of StartPoint and select Report Manager. The Report Manager screen opens displaying the Cross-Tiers tab.

To launch Report Manager for a specific Tier (in context), from the StartPoint screen, right-click a specific Tier and from the pop-up menu select Report Manager. The Report Manager screen opens displaying the specified Tier tab.