# Frequently Performed Tasks and Procedures

This chapter contains the following topics:



## Frequently Performed Procedures

This section provides a quick access to frequently performed procedures in Cisco IMC Supervisor. The reference directs you to the section of the document where the detailed procedures has already been described.

| Procedure | Reference |
|---|---|
| How to log in Cisco IMC Supervisor | Launching Cisco IMC Supervisor |
| How to upgrade license | Updating the License |
| How to add login users in Cisco IMC Supervisor | Creating a User Account |
| How to add a rack group | Adding a Rack Group |
| How to create a rack account | Adding a Rack Account |

## Miscellaneous Procedures

The following sections include miscellaneous procedures that you would perform using Cisco IMC Supervisor.

### Enabling Dashboard View

Perform this procedure to enable the dashboard view in the Cisco IMC Supervisor menu bar.

### Procedure

**Step 1** Click the username with which you logged in to the application. The username is on the far right of the application header.

**Step 2** In the **User Information** window, click **Dashboard**.

**Step 3** Check the **Enable Dashboard (in the top level menu)** check box to enable the dashboard.

**Step 4** Click **Apply** and close the window.

**Note** You can see the **Dashboard** tab in the menu bar.

## Enabling Dashboard Auto Refresh

Perform this procedure to enable auto refreshing for the reports added on the dashboard. You can also define the refresh rate.

### Procedure

**Step 1** From the menu bar, choose **Dashboard**.

**Step 2** In the **Dashboard** panel, beside the **Automatic Refresh** option, click **OFF**.
**Automatic Refresh** option changes to **ON** and **Interval** slide bar is visible.

**Step 3** Using the **Interval**, set the refresh rate.

**Note** You can set the refresh rate in multiples of 5 minutes up to a maximum of 60 minutes.

## Adding Summary Reports to Dashboard

Perform this procedure to add a summary report to dashboard for quick access.

**Note** Only summary reports can be added to dashboard.

### Procedure

**Step 1** Browse to the summary report you want to add to the dashboard.

**Step 2** Click the down arrow on the right upper corner of the report panel.

**Step 3** Click **Add to Dashboard**.

**Note** **Add to Dashboard** option is available only if the summary report supports dashboard view.

**Step 4** From the menu bar, choose **Dashboard** and verify that the report appears on the dashboard.

# Adding a Menu or Tab to Favorites

Perform this procedure to add a menu option or tab to **Favorites** menu.

### Procedure

**Step 1** Browse to the menu or tab you want to add to **Favorites** menu.

**Step 2** Click **Favorite**.

**Note** You can see the **Favorite** button only if the menu or tab supports it.

**Step 3** In the **Favorite Report** dialog box, you may edit the **Menu Label** field.

**Step 4** Click **Save**.

**Step 5** From the menu bar, choose **Favorites** and verify the new menu is visible.

# Customizing Report Table View

Perform this procedure to add or remove any field in a report table.

### Before You Begin

If any window supports customizing the table, it will display the **Customize Table View** icon on the far right of the page.

### Procedure

**Step 1** Locate and click the **Customize Table View** icon on the far right of the page.

**Step 2** In the **Customize Report Table** dialog box, you may do the following:

- To display any field in the table report, check the checkbox against that field.
- To remove any field from the table report, uncheck the checkbox against that field.
- To reset to default table view, click **Reset to Default**.

**Step 3** Click **Save**.

# Filtering Reports

Perform this procedure to filter the data based on user defined criteria.

### Before You Begin

If any window supports filtering the data, it will display the **Add Advanced Filter** icon on the far right of the page.

### Procedure

**Step 1** Locate and click the **Add Advanced Filter** icon on the far right of the page.
Every time you click the icon, it adds a filter criteria on top of the report table.

**Step 2** In the **Match Condition** drop-down list, choose **Match All Conditions** or **Match Any Condition** as required.

**Step 3** In **Search in Column** drop-down list, choose the field based on which you want to filter the data.

**Step 4** In **Text** field, enter a value based on which you want to filter the data.

**Step 5** If you have more than one filter criterion, then repeat Step Step 3 and Step Step 4 for all the criteria.

**Step 6** Click **Search**.

# Exporting a Report

Perform this procedure to export the report data based in PDF, CSV, or XLS format.

### Before You Begin

If any window supports exporting the report data, it will display the **Export Report** icon on the far right of the page.

### Procedure

**Step 1** Locate and click the **Export Report** icon on the far right of the page.

**Step 2** In the **Export Report** dialog box, complete the following:

1. From **Select Report Format** drop-down list, choose PDF, CSV, or XLS.
2. **Click Generate Report.**
3. **Once the report is generated, click Download.**

Report is generated in the selected format in a new window.

**Step 3** In the **Export Report** dialog box, click **Close**.