

How to use the Offline Macro within the Smart Net Total Care Portal

Updated 07/16/18

Requesting Required Reports from the Portal

The screenshot displays the Cisco Services Connection portal interface. On the left, a blue navigation sidebar contains several menu items. The 'Actions' section is expanded, and the 'Schedule Report' option is highlighted with a red rectangular box. The main content area shows a notification banner at the top, followed by the 'Smart Net Total Care' section. Below this, there is a summary for 'Equipment: Equipment Type (473)' with an 'Export' button. A donut chart titled 'Equipment Type' shows the distribution of equipment types: 47% MODULE: 224, 25% CHASSIS: 117, and 15% FAN: 70. At the bottom, an 'Active Alerts Summary: Type (558 Alerts)' is visible.

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Smart Net Total Care

CUSTOMER: **SNTC Demo Accou...**

INVENTORY AND SEGMENT: **SNTC_DEMO**

Application Settings

My Reports

Useful Links

Actions

Schedule Report

+ Dashboards

Admin

Alert Management

Contract Management

Inventory Management

Cisco Services Connection

A new version of the CSPC collector is available. Upgrade your CSPC to [version 2.7.4.2](#). Upgrade now to avoid a manual upgrade process later and to take advantage of security and ease of

Smart Net Total Care

Equipment: Equipment Type (473)

Export

Equipment Type

473

Legend

- 47% MODULE: 224
- 25% CHASSIS: 117
- 15% FAN: 70

Active Alerts Summary: Type (558 Alerts)

To request the **Product Alerts** and **Custom Inventory** reports within the portal, click **'Schedule Report'** under the **'Actions'** section in the left navigation panel

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Schedule Report

+ Schedule Report

< Jul 26 - Aug 01, 2018 > Today

2018 Thu, Jul 26 Fri, Jul 27 Sat, Jul 28 Sun, Jul 29

12 am

1 am

2 am

3 am

4 am

5 am

Schedule Report(s)

Report Type Report Type

Report Name Report Type

Description Consolidated Bug Report
Contracts Management Report
Custom Inventory Report
Inventory Collection Delta
Inventory Insight Report

Customer

Inventory **Product Alerts Report**

Format

Set up recurrence

Notification: By Email and Notification

Schedule Cancel

Next, click **'Schedule Report'**.

Then select **'Product Alerts Report'** from the Report Type drop-down list.

Requesting Required Reports from the Portal

Schedule Report(s) [X]

Report Type: Product Alerts Report

Report Name: Product Alerts Report_sydfishe_1532623205619

Description:

Customer: SNTC Demo Account (CISCO SYSTEMS INC FOR US INTERNAL DEMO EVAL ONLY)

Inventory / Segment: SNTC_DEMO

Format: PDF XLS

Set up recurrence: Once, Immediately

Notification: By Email and Notification

[Schedule] [Cancel]

Make sure the Format is set to 'XLS'.
(Verify the blue radio button is selected to the left of 'XLS')

To generate the report immediately, select '**Once, immediately**' from the **Set up occurrence** field.

Click '**Schedule**'

An information prompt will display to confirm the report has been requested. Click '**OK**'.

Requesting Required Reports from the Portal

Smart Net Total Care

CUSTOMER: SNTC Demo Accou...

INVENTORY AND SEGMENT: SNTC_DEMO

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My Reports (2)

Export

Report Name	Download	Inventory	Segment	Status	Requested
...
<input type="checkbox"/> Custom Inventory Re...	XLSX	SNTC_DEMO		Success	Jul 26, 20
<input type="checkbox"/> Product Alerts Report...	XLSX	SNTC_DEMO		Success	Jul 26, 20

You will receive an email from the tool to your registered email address once the data is available. The files can be found in the **'My Reports'** section on the left navigation panel.

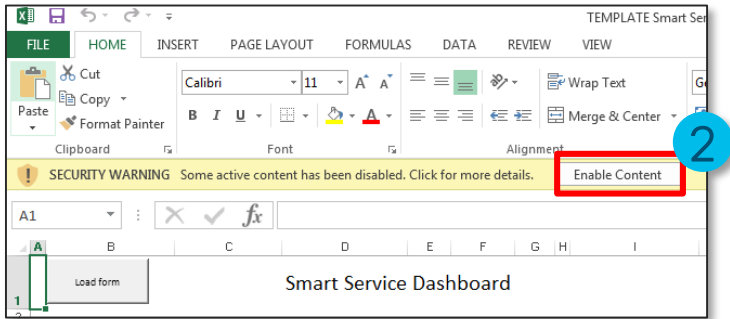
Click the **'XLSX'** link to download the report. Save it to your machine.

Repeat this process, but request the **'Custom Inventory Report'**.

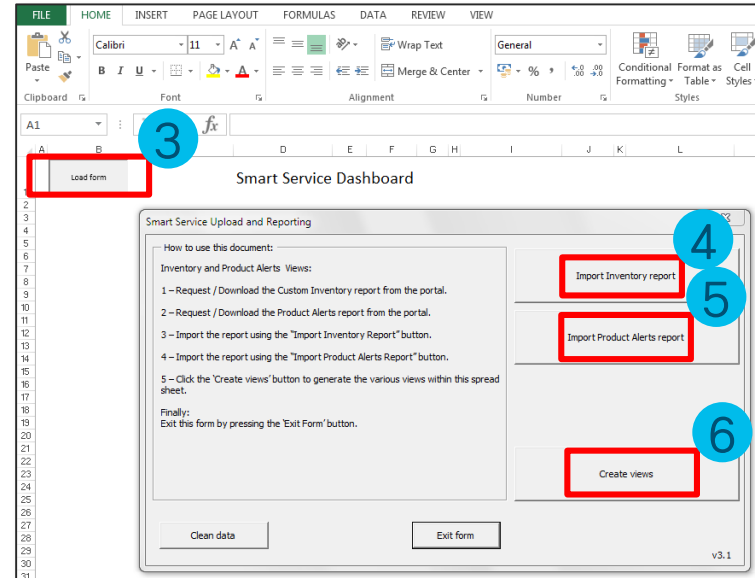
Finally, import the data into the macro using the instructions on the next slide.

Importing Reports into the Macro

1. Open the macro from your hard-drive.
2. Upon prompt click, **'Enable Content'**.



3. Click, **'Load form'**.
4. Click, **'Import Inventory report'**.
 - Select the inventory file you downloaded previously from the portal.
 - Click **'OK'** when done.
5. Click, **'Import Product Alerts report'**.
 - Select the product alerts file you downloaded previously from the portal.
 - Click **'OK'** when done.



Note: Click, **'Clean data'** to clear data from macro and restart the process

6. Click, **'Create views'** to generate the Dashboard report and various tabs. Click **'OK'** when the report generation is complete.
7. Click, **'Exit form'**.

