

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

Updated 10/26/17

# Requesting Required Reports from the Portal

The screenshot displays the Cisco Services Connection portal interface. On the left is a blue navigation sidebar with a 'Back' button at the top. Below it, the 'Smart Net Total Care' section shows customer information: 'Demo Account ( CISCO...)' and 'Demo\_Richardson\_DC'. Further down are links for 'Application Settings', 'My Reports', and 'Useful Links'. The 'Actions' section is expanded, and the 'Schedule Report' option is highlighted with a red rectangular box. Below 'Actions' are 'Dashboards', 'Admin', and 'Alert Management' sections.

The main content area is titled 'Smart Net Total Care' and shows 'Equipment: Equipment Type (429)'. There is an 'Export' button and a refresh icon. Below this is a donut chart titled 'Equipment Type' with a total count of 429. The chart is divided into three segments: a blue segment (42%), a yellow segment (28%), and a red segment (16%). A legend below the chart provides the following data:

Category	Percentage	Count
MODULE	42%	181
CHASSIS	28%	122
POWER_SUPPLY	16%	70

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

# Requesting Required Reports from the Portal

The screenshot displays the Cisco Services Connection portal interface. On the left is a blue navigation sidebar with options like 'Smart Net Total Care', 'Application Settings', and 'Schedule Report'. The main content area shows a 'Schedule Report' modal. A red box labeled '1' highlights the 'Schedule Report' button in the top navigation bar. A modal dialog box is open, showing a dropdown menu with 'Product Alerts Report' selected (2), and a 'Proceed' button highlighted with a red box (3). The background shows a calendar grid for June 2017.

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

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

And click **'Proceed'**.

# Requesting Required Reports from the Portal

Schedule Report(s): Product Alerts Report Help

**Name and Description**

Set up Recurrence

Enter Notification

Generate Report

**Name and Description**

Report Name: Product Alerts Report\_sydfishe\_146257676336

Description(Optional):

Default Setting:

Customer: CISCO SYSTEMS INC FOR US  
INTERNAL DEMO EVAL ONLY

Inventory / Segment: Demo\_Richardson\_DC

Recurrence: Once, immediately

Format:  XLS  PDF

Notify Me: by Email and Notification

Select Run Now for quick report or click Next to see more options.

Close Run Now Next

The default for this report is set to 'XLS', this should be selected, but please verify the blue radio button is selected to the left of 'XLS'.

To generate the report immediately, click **'Run Now'**.

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

**Optional:** Use the report scheduler to automatically generate this report by clicking **'Next'**, and following the schedule wizard.

# Requesting Required Reports from the Portal

Smart Net Total Care

CUSTOMER: CISCO SYSTEMS IN...  
INVENTORY AND SEGMENT: Demo\_Richardson\_...

Application Settings  
**My Reports**  
Useful Links

Smart Services Connection

My Reports (1)

Export

Report Name	Download	Inventory	Segment	Status
...	...	...	...	...
<input type="checkbox"/> Product Alerts Report...	<a href="#">XLSX</a>	Demo_Richardson...		Success

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.

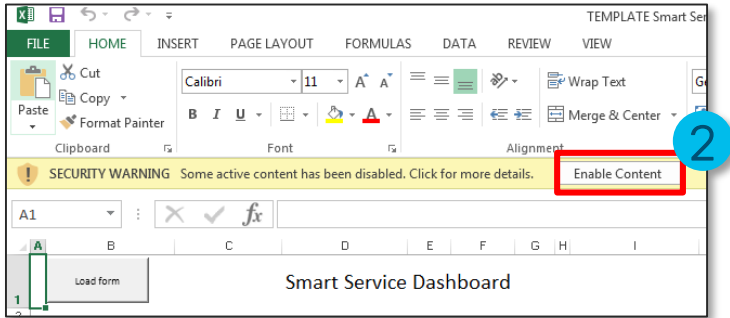
Click the **'XLSX'** link to download the report. Save it to your machine.

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

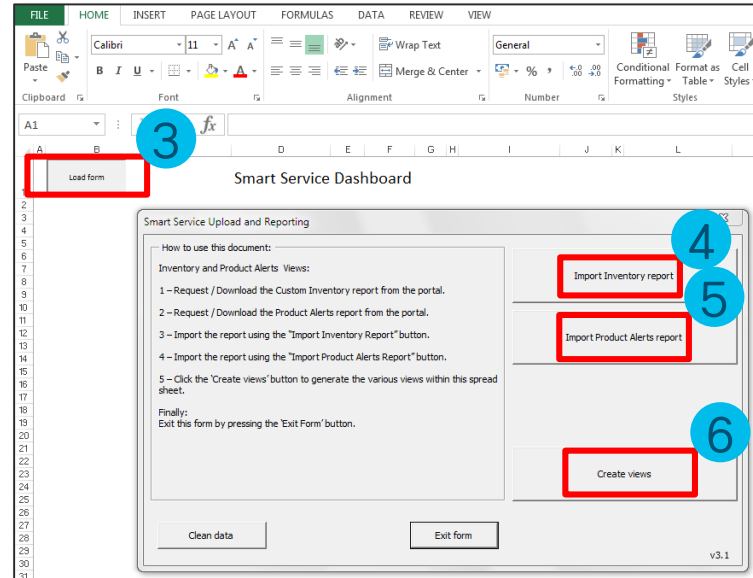
Finally, import the data into the macro using the instructions on the next two slides.

# 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.
7. Click, **'Exit form'**.

