

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

Updated 10/26/17-v2

# 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 donut chart. The donut chart is labeled 'Equipment Type' and has a total value of 429. The legend below the chart provides the following data:

Category	Percentage	Count
42% MODULE	42%	181
28% CHASSIS	28%	122
16% 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' header with a date range of 'Jun 21 - Jun 27, 2017'. A calendar grid is visible below. A modal dialog box is overlaid on the calendar, containing a dropdown menu with 'Product Alerts Report' selected and 'Proceed' and 'Cancel' buttons. Red boxes and blue circles with numbers 1, 2, and 3 highlight the 'Schedule Report' button, the dropdown selection, and the 'Proceed' button respectively.

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

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

And click **'Proceed'**.

# Requesting Required Reports from the Portal

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 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.

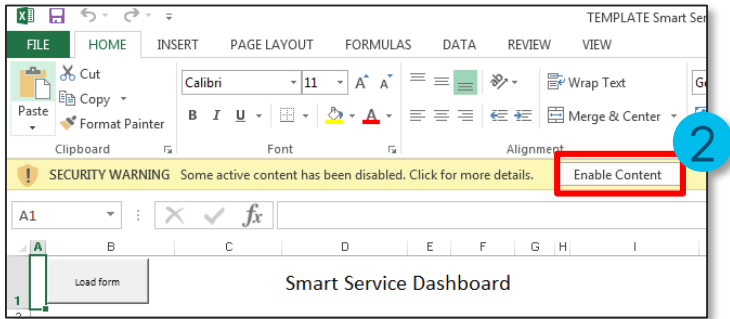
# Important!!

In the Custom Inventory Report > Custom Inventory tab

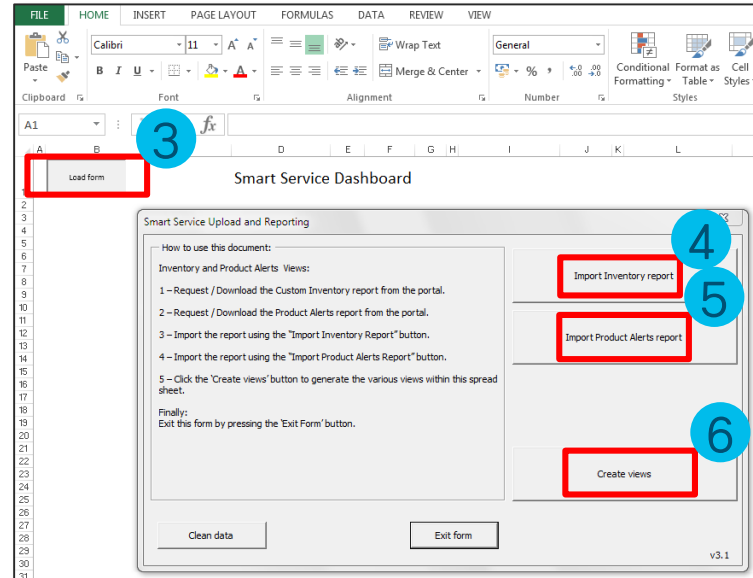
- **Delete the Mac Address column (Column D)** before you import the file into the template, for reports generated by the Smart Net Total Care portal release 3.10 and above in order to get a proper analysis of your inventory.

# 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'**.

