

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

Updated 6/21/17

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 is visible, containing customer information: 'CUSTOMER: Demo Account (CISCO...)' and 'INVENTORY AND SEGMENT: 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 shows the 'Smart Net Total Care' header, followed by 'Equipment: Equipment Type (429)'. An 'Export' button is present. 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, a blue sidebar contains navigation options: 'Back', 'Smart Net Total Care', 'CUSTOMER: Demo Account (CISCO...', 'INVENTORY AND SEGMENT: Demo_Richardson_DC', 'Application Settings', 'My Reports', 'Useful Links', 'Actions', 'Schedule Report', 'Dashboards', 'Admin', and 'Alert Management'. The main content area shows the 'Schedule Report' page with a calendar for June 2017. 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, labeled '2'. A red box labeled '3' highlights the 'Proceed' button in the modal.

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:

Description(Optional):

Default Setting:

Customer: CISCO SYSTEMS INC FOR US
INTERNAL DEMO EVAL ONLY

Inventory / Segment: Demo_Richardson_DC

Recurrence: Once, immediately 1

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 2

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... | XLSX | 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.

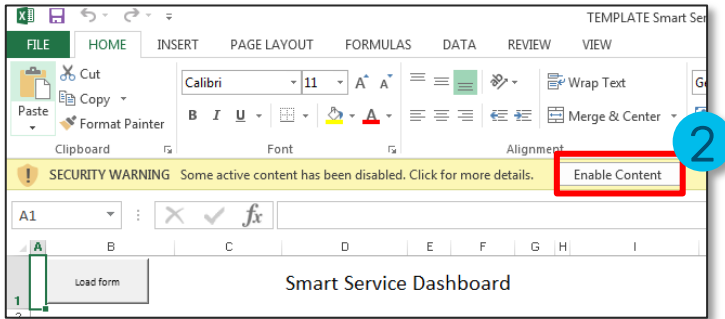
Important!!

In the Custom Inventory Report > Custom Inventory tab

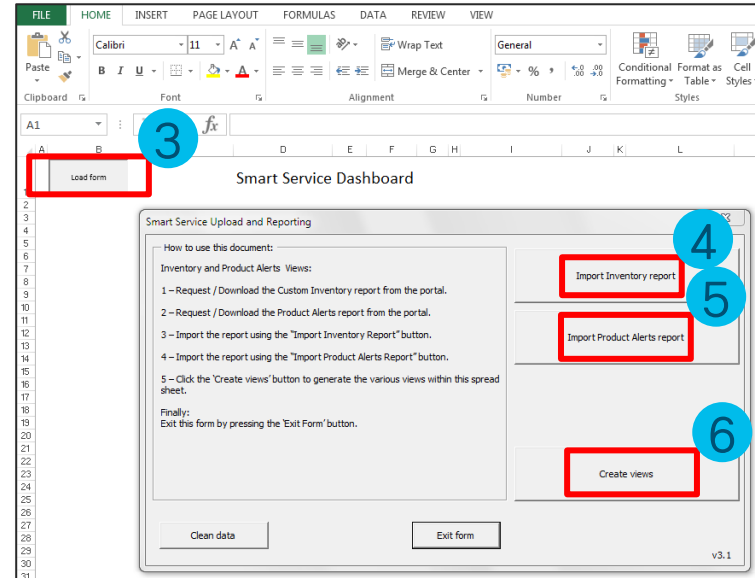
- **Delete the Mac Address column (Column D)** before you import the file into the template, for reports generated by the Smart Net Total Care portal release 3.10 and above in order to get a proper analysis of your inventory.

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'**.

