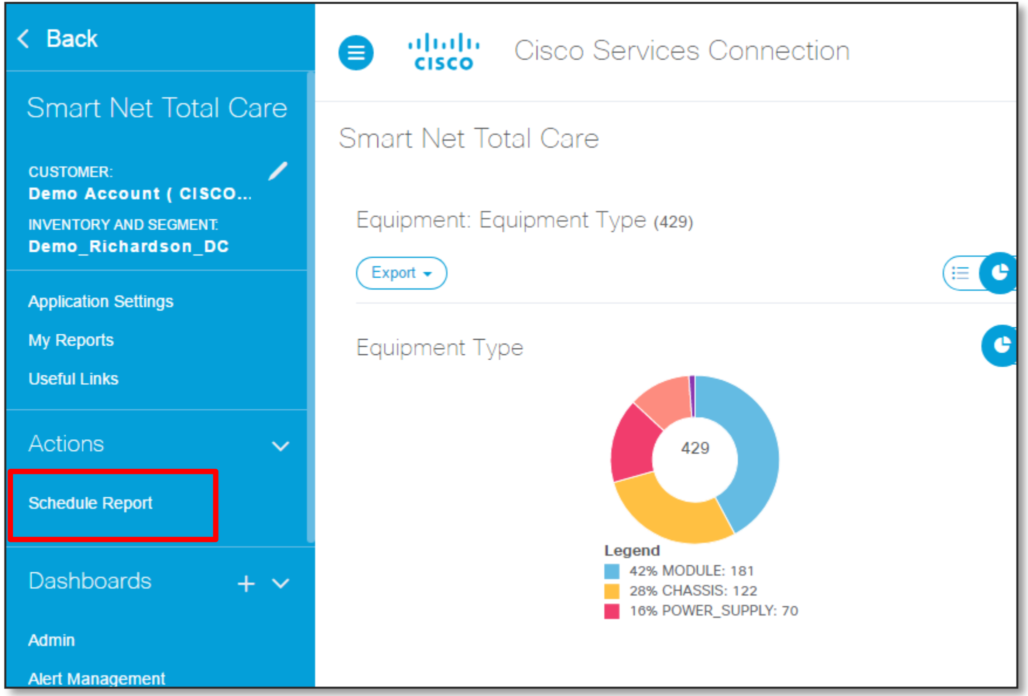
How to use the Offline Macro within the Smart Net Total Care Portal

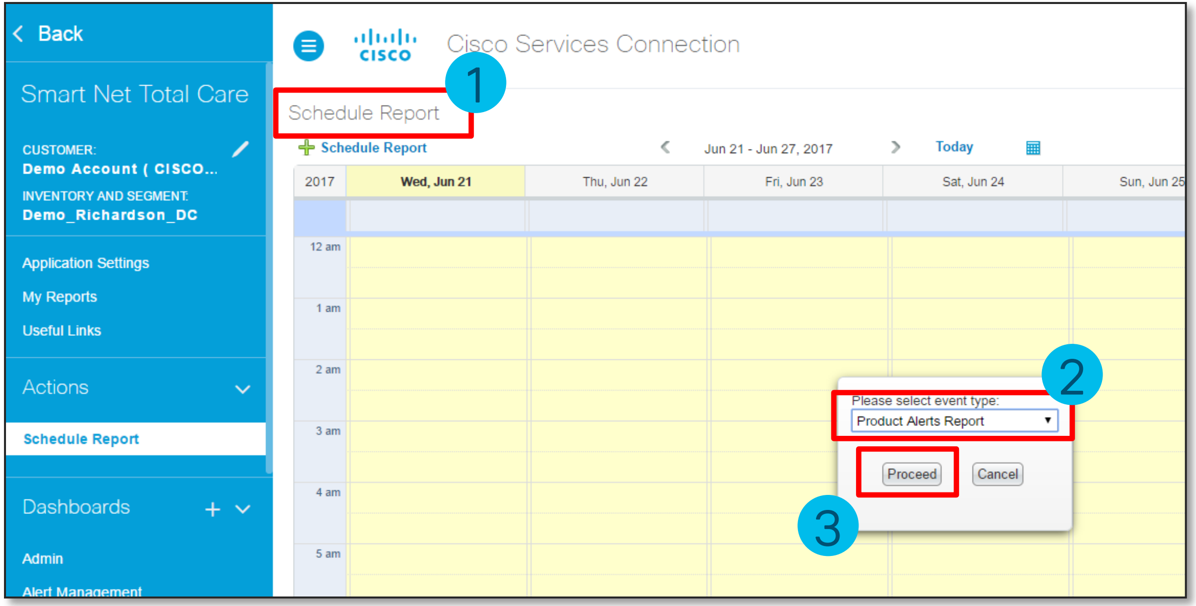
Updated 6/21/17

Requesting Required Reports from the Portal



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

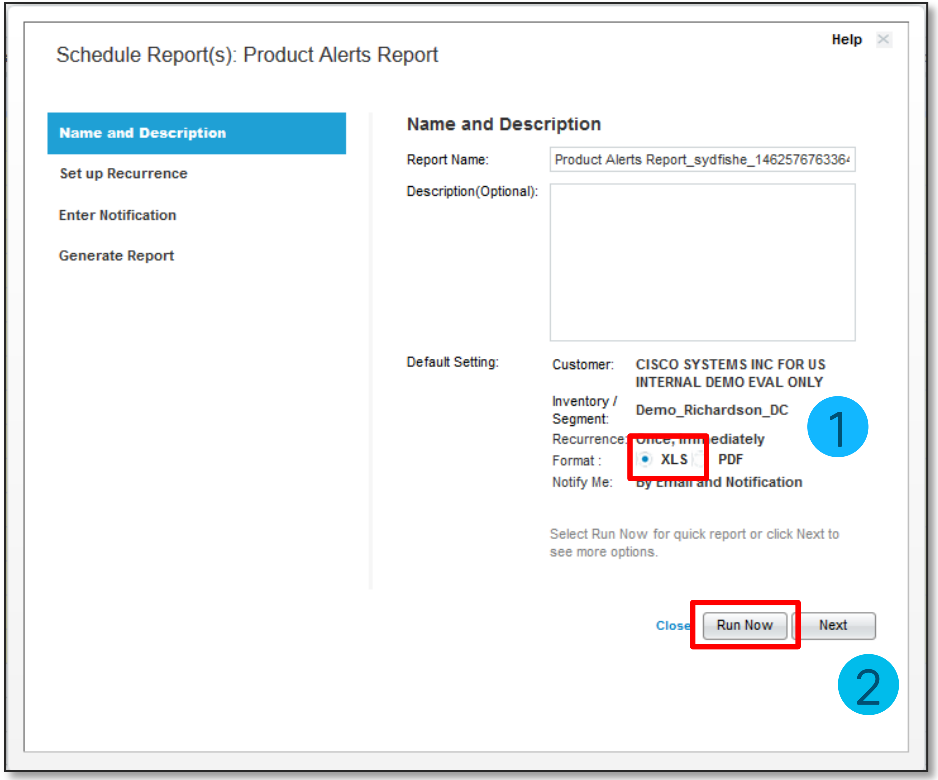


Next, click ***'Schedule Report'*** .

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

And click ***'Proceed'***.

Requesting Required Reports from the Portal



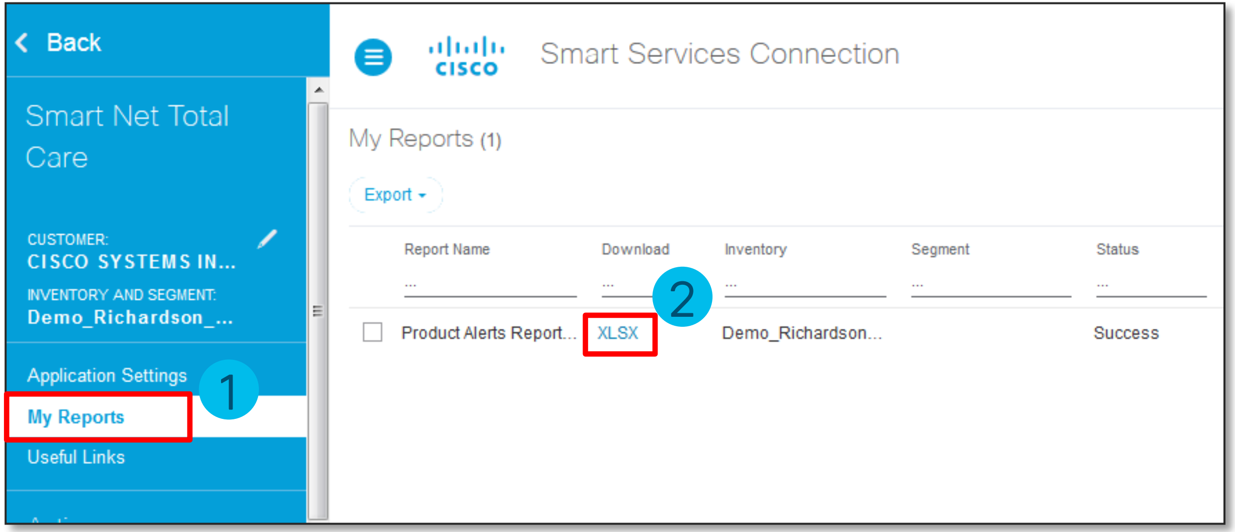
The default for this report is set to 'XLS', this should be selected, but please verify the blue radio button is selected to the left of 'XLS'.

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



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!!

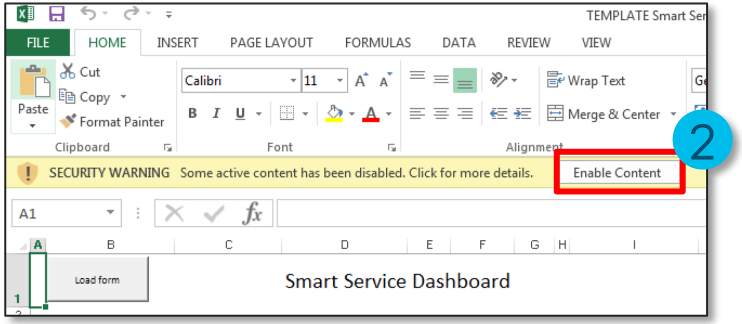
In the Custom Inventory Report > Custom Inventory tab

- 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.

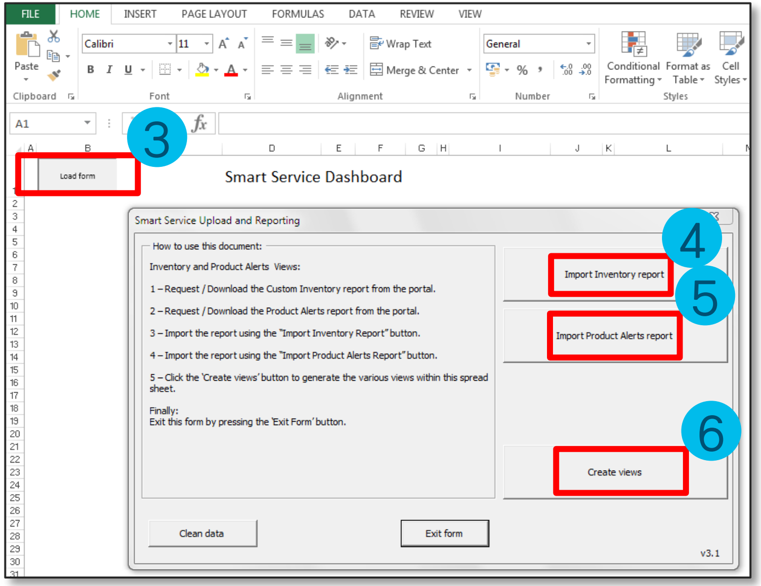
2. Upon prompt click, ***'Enable Content'***.



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'***.

cisco