

Enterprise Reporter 2.5.1

Report Manager User Guide



© 2015 Dell Inc.
ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Dell Inc.

The information in this document is provided in connection with Dell products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Dell products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, DELL ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL DELL BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF DELL HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Dell makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Dell does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Dell Inc.
Attn: LEGAL Dept
5 Polaris Way
Aliso Viejo, CA 92656

Refer to our web site (www.software.dell.com) for regional and international office information.


Patents


This product is protected by U.S. Patent #8,601,539 and #8,838,654. Additional Patents Pending.


Trademarks

Dell and the Dell logo are trademarks of Dell Inc. and/or its affiliates. AMD is a trademark of Advanced Micro Devices, Inc. EMC, EMC Celerra, Isilon OneFS are registered trademarks or trademarks of EMC Corporation in the United States and other countries. Intel is a trademark of Intel Corporation in the U.S. and/or other countries. Microsoft, Active Directory, SQL Server, Visual C++, Excel, Windows, Windows Server, and Windows Vista are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. NetApp, the NetApp logo, and Data ONTAP are trademarks or registered trademarks of NetApp, Inc. in the United States and/or other countries. Perl and the Perl logo are trademarks of the Perl Foundation. Android is a trademark of Google, Inc. Other trademarks and trade names may be used in this document to refer to either the entities claiming the marks and names or their products. Dell disclaims any proprietary interest in the marks and names of others.

Legend

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

 **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

Contents

Introducing the Report Manager	6
Starting the Report Manager	6
An Overview of the Report Manager Security	6
Explaining My Reports, Published Reports, and the Report Library	7
What are My Reports?	8
What are Published Reports?	8
What is the Report Library?	8
Reports Included in Enterprise Reporter	8
Active Directory® Reports	9
Change History Reports	11
Computer Reports	12
File Storage Analysis Reports	14
Microsoft SQL Reports	21
NTFS Reports	23
Registry Reports	26
Report Types Included in Enterprise Reporter	26
Active Directory® Report Types	27
Common Objects Report Types	28
Computer Report Types	28
File Storage Analysis Report Types	30
NTFS Report Types	30
Registry Report Types	31
SQL Server® Report Types	31
Configuring Global Settings (System Configuration)	32
Running and Scheduling Reports	34
Running Reports	34
Running Category Reports	34
Running Regular Reports	35
Running Reports or Exporting Reports to CSV from Different Containers	36
Entering Parameter Values	36
Searching for Parameter Values	38
Using Saved Parameters	38
Searching for a Report	38
Viewing Report Properties	39
Previewing a Report	39
Printing a Report	40
Exporting a Report to Other Formats	40
Configuring a Default SMTP Server	41
Scheduling Reports	41
Creating a Schedule	42
Types of Schedules	45

Working with Schedules	47
Troubleshooting Scheduling Issues	49
Using the Credential Manager	49
Changing Passwords Using the Credential Manager	50
Changing Account Names Using the Credential Manager	51
Organizing Reports	51
Working with Report Categories	51
Moving Reports	52
Copying Reports	52
Deleting Reports	53
Using My Reports	53
Creating and Editing Reports	54
Editing Reports	54
Using My Reports	54
Modifying the Fields to be Included	55
Working with Report Parameters	57
Changing the Layout	65
Report Modification Example	66
Creating New Reports	67
Creating Report Layouts	68
Exporting and Importing Report Definitions	69
Report Designer Tips and Tricks	69
Report Bands	70
Binding a Data Field to a Control	70
Adding a Parameter Field to a Report Layout	71
Adding a New Grouping to a Report Layout	71
Adding a New Column to a Table	72
Formatting Rules:	
Hiding or Showing a Field Based on Data Values	72
Creating a Calculated Field	73
Creating a Script to Run with a Report	74
Publishing Reports	74
Publishing Reports to Knowledge Portal	75
Configuring Knowledge Portal	75
Publishing Reports to Knowledge Portal	76
Exploring Access	77
Explore	77
Exploring Access Data	77
Configuring Access Explorer	78
Setting Automatic Cache Refresh	78
Setting Maximum Record Display	78
Managing Accounts	79
Adding Accounts	79
Removing Accounts	79
Exploring Accounts	79

Sorting and Filtering Columns . . . . .	.80
Filtering the Resource List . . . . .	.81
Creating a Custom Filter . . . . .	.81
Editing a Custom Filter . . . . .	.81
Clearing a Filter . . . . .	.81
Viewing Group Membership . . . . .	.82
Viewing Permissions . . . . .	.82
Reporting on Permissions . . . . .	.82
Generating a permissions report . . . . .	.84
Troubleshooting Issues with Enterprise Reporter . . . . .	.85
Troubleshooting Connectivity Issues . . . . .	.85
Restoring a Connection to the Enterprise Reporter Server . . . . .	.85
Restoring a Connection to the Enterprise Reporter Database . . . . .	.86
Troubleshooting Connection Timeouts . . . . .	.86
Troubleshooting Credential Change Failures . . . . .	.86
Resolving Issues in the Report Manager . . . . .	.87
What To Do if the Data in Your Report is Not What You Expect . . . . .	.87
Issues with Your Scheduled Reports . . . . .	.88
Other Issues . . . . .	.88
Viewing Information About Your Enterprise Reporter Configuration . . . . .	.89
Index . . . . .	.90
About Dell . . . . .	.93
Contacting Dell . . . . .	.93
Technical Support Resources . . . . .	.93

Introducing the Report Manager

- [Starting the Report Manager](#)
- [An Overview of the Report Manager Security](#)
- [Explaining My Reports, Published Reports, and the Report Library](#)
- [Reports Included in Enterprise Reporter](#)
- [Configuring Global Settings \(System Configuration\)](#)

Starting the Report Manager

The Report Manager is used to generate reports. You can run existing reports, or create your own custom reports. The reports use data collected by the Configuration Manager.

NOTE: To start the Report Manager, you must be a reporting administrator or a reporting user. Contact your Enterprise Reporter administrator for assistance.

To start the Report Manager

- 1 Click the **Start** menu and select **All Programs | Dell | Enterprise Reporter | Report Manager**.
- 2 Type the name of the Enterprise Reporter server.
- OR -
Click **Browse**, and locate the computer where the server is installed.
Once you have connected to a server, the server name is stored in the drop-down list for future use.
- 3 To connect to the database using SQL credentials, instead of the logged in user, click **Advanced**, then choose SQL Server® Authentication and enter your user name and password.
If you want to connect to the database using these credentials as the default, select Remember Credentials.
- 4 If necessary, type in the port number.
- 5 Click **Connect**.

If this is your first time opening the console, you will need to provide your country so your status in the Software Improvement Program can be determined. You can choose to participate by configuring the software improvement settings on the System | Configuration page.

An Overview of the Report Manager Security

The Report Manager needs to be able to access both the Enterprise Reporter server, the Enterprise Reporter database, and the Access Explorer database, as shown in [Figure 1](#).

Figure 1. Credentials used to communicate in Enterprise Reporter



The logged in credentials need the following permissions in order to successfully run and create reports and use Access Explorer:

- To log in to the Report Manager, the logged in user must be in the Reporter_Reporting_Admins or Reporter_Reporting_Operators security group. For more information, see the Dell Enterprise Reporter Installation and Deployment Guide in the [Technical Documentation](#).
- To run reports in Access Explorer, the logged in user must be in the Reporter_Exploring_Operators group.
- To access the server, the logged in user must be a domain account.
- The account being used to access the database must have read access to the database to read reports, and write access to the database to publish reports. This account is chosen when you log in to the Report Manager. If you are using Windows® authentication, the account should already have these permissions because they must be in a security group in order to log in to the console. SQL accounts must be permissioned manually.

SQL Authentication is only supported for the Enterprise Reporter database, not the Access Explorer database.

Explaining My Reports, Published Reports, and the Report Library

Enterprise Reporter has three different report containers, each with its own intended use. They are shown in the treeview of the console. Each container can be expanded to show the categories and reports it contains.

What are My Reports?

As you use Enterprise Reporter, you will find that there are reports that you use a lot, or reports that you want to customize. You can store these in the My Reports container. You decide what reports appear in My Reports by copying them from other containers (see [Copying Reports](#) on page 52) or creating them from scratch (see [Creating New Reports](#) on page 67). My Reports is unique to each user, so different users will have different contents in their My Reports container. You can see your My Reports container on any computer that you are

logged in to. You can create your own categories to keep these reports organized for easy access (see [Working with Report Categories](#) on page 51). Reports in this container are the only reports you can schedule (see [Scheduling Reports](#) on page 41).

What are Published Reports?

Reporting administrators can publish reports that will be useful to their users. When a report is added to the Published Reports container, it is visible to all reporting users the next time they open their console. These reports are generally customized to suit your environment. You can base a published report on a report from the library, or you can create a new report and publish it. To prevent users from accidentally running an unfinished report, you cannot create or edit reports directly in Published Reports.

You cannot modify published reports, but you can fill in the parameters and run them.

If you are a reporting user, you can run reports from the published reports container, and copy them to My Reports (see [Copying Reports](#) on page 52) so they can be modified (see [Editing Reports](#) on page 54). For example, you may want to run different versions of the same report. By creating several copies in My Reports and saving the parameter values, you can save yourself time.

What is the Report Library?

The Library is only visible to reporting administrators. It contains all available pre-defined reports included with Enterprise Reporter, organized by type of discovery (see [Reports Included in Enterprise Reporter](#) on page 8). Reports in the library cannot be modified or moved, so you need to first copy them to My Reports if you would like to work with them (see [Copying Reports](#) on page 52). These reports can serve as the basis for your published reports. For more information on the publishing workflow, see [Publishing Reports](#) on page 74.

Reports Included in Enterprise Reporter

The reports included in Enterprise Reporter are located in the Library, and can only be seen by reporting administrators. The reports include the results of all discoveries that have been run on the server to which the console is connected. If you would like to customize a report, you need to create a copy in My Reports (see [Copying Reports](#) on page 52) and modify it (see [Editing Reports](#) on page 54).

-

Active Directory® Reports

The following table outlines the Active Directory® reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports. For each report, you must specify the domains on which you want to report.

Table 1. Active Directory® Reports

Report Name	Description
Migration Assessment	
Duplicate Domain Computers	Shows duplicate computers in the selected domains. Two or more domains must be specified.
Duplicate Domain Groups	Shows duplicate groups in the selected domains. Two or more domains must be specified.
Duplicate Domain Users	Shows duplicate users in the selected domains. Two or more domains must be specified.

Table 1. Active Directory® Reports

Report Name	Description
QMM Matching Computers	Shows matching computers using information generated during a migration with Quest Migration Manager. You can select a field to be matched.
QMM Matching Groups	Shows matching groups using information generated during a migration with Quest Migration Manager. You can select a field to be matched.
QMM Matching Users	Shows matching users using information generated during a migration with Quest Migration Manager. You can select a field to be matched.
Passwords	
Domain Users with Changed Passwords	Shows all domain users who have changed their password in the selected time frame for the selected domains. You can filter on selected organizational units or users.
Domain Users with Expired Passwords	Shows all users with expired passwords for the selected domains. You can filter on selected organizational units or users.
Domain Users with Older Passwords	Shows all domain users who have not changed their password in the selected time frame. You can filter on selected organizational units or users.
Last Password Change and Logon for Domain Computers	Shows the last password change and last logon for computers in the selected domains. You can filter on specific organizational units and computers.
Password Expiration Date	Shows the password expiration date for the selected accounts.
User Password Information	Shows user password information for the selected domains. You can filter on selected organizational units or users.
Other	
Account Expiration Date	Shows the account expiration date for the selected accounts.
Account Operators	Shows the members of the account operators group for the selected domains.
Active Directory Permissions	Shows all Active Directory® permissions for the selected domains and Active Directory® objects.
Active Directory Permissions for Account	Shows the Active Directory® permissions for an account, including permissions derived through group membership.
All Names for Active Directory Users	Shows all the Active Directory® names for the selected user accounts.
Computer Role Information	Shows role information for all the computers for the selected domains.
Computers with Browser Service Role	Shows all the computers with browser service role for the selected domains.
Computers with Server Role	Shows all the computers with server role for the selected domains.
Computers with Workstation Role	Shows all computers with workstation role for the selected domains.
Disabled Accounts	Shows all the disabled accounts for the selected domains.
Domain Accounts	Shows all the domain accounts for the selected domains. You can filter on selected organizational units, accounts, and account scopes.
Domain Computer Information	Shows the domain computer information in selected domains. You can filter on selected organizational units, or computers.
Domain Controller Information	Shows domain controller information for the selected domains. You can filter on selected organizational units or specific domain controllers.
Domain Groups	Shows all the domain groups for the selected domains. You can filter on selected organizational units, specific groups, the group scope, or the type of group.

Table 1. Active Directory® Reports

Report Name	Description
Domain Groups with Members	Shows the group membership for the selected domains and groups. Contains a parameter to include nested group memberships and options on how they are displayed in the report. For more information, see The Expand Nested Groups Parameter on page 37. Foreign groups only appear if they were included in the applicable discovery. For more information, see the Dell Enterprise Reporter Configuration Manager User Guide in the Technical Documentation . You can filter on organizational units and specific groups.
Domain Groups without Members	For the selected domain, shows the groups that do not have any members.
Domain Hidden Computers	Shows all hidden computers for the selected domains. Note: This report utilizes information collected only when the "Collect additional computer and account attributes from physical computers" check box is selected in the Active Directory® discovery.
Domain Sites	Shows all the sites in the selected domains. You can filter on specific sites.
Domain Summary	Shows a domain summary for the selected domains. Includes a bar graph summarizing the number of objects per domain level at the beginning of the report. Note: Summary information is only available if Active Direct discovery collections that include object counts for the selected domains have been completed.
Domain Trusts	Shows all the trust relationships for the selected domains. You can filter on a second set of domains to focus on specific trusts.
Domain Users	Shows all the domain users in the selected domains. You can filter on selected organizational units or users, and choose to show only disabled or locked domain user accounts.
Domain Users with Recent Logons	Shows users in the selected domains who have logged on in the selected time frame. You can filter on organizational units and selected users. You define the number of days considered recent.
Domain Users without Recent Logons	Shows users in the selected domains who have not logged on in the selected time frame. You can filter on organizational units and selected users. You define the number of days considered recent.
Group Membership by Domain Account	Shows all groups to which the selected domain accounts belong. You can filter on selected organizational units and accounts (user or group).
Locked Out Accounts	Shows all the locked out accounts for the selected domains.
Member Servers	Shows the member server information for the selected domains.
Published Printer Information	Shows published printer information for the selected domains.
Remote Access Profile (RAS) Information	Shows RAS information for the selected user accounts.
Remote Control Settings Information	Shows terminal services remote control settings of the users for the selected domains.
Terminal Services Profile Information	Shows terminal services profile information of the users for the selected domains.
Users Not Logged On In The Past 30 Days	Shows users in the selected domains who have not logged on in the past 30 days.
User That Have Never Logged On	Shows users in the selected domains who have never logged on.
Users with An Exchange Mailbox	Shows Active Directory® Users that have an Exchange mailbox as set by the Active Directory® Connector.

Change History Reports

The following table outlines the change history reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports. These reports show you changes over time to the selected objects, including additions, deletions, and changes to the properties.

Change history data must be enabled in the discovery that collected the data for the objects on which you want to report. If this data is not available in your report, contact your Enterprise Reporter administrator, or see the Dell Enterprise Reporter Configuration Manager User Guide in the [Technical Documentation](#).

Table 2. Change History Reports

Report Name	Description
Active Directory Change History	Shows the changes made over time to the selected domains. You can filter on the AD objects in which you are interested, and select a date range for the changes included in your report.
Computer Change History	Shows the changes made over time to the selected computers. You can filter on domains, and select specific computers. As changes are collected, they are grouped into types, allowing you to report on specific activity. You can select a date range for the changes included in your report.
Database Change History	Shows the changes made over time to the selected SQL databases. You can filter on SQL Server®, and select specific SQL instances or databases. As changes are collected, they are grouped into types, allowing you to report on specific activity. You can select a date range for the changes included in your report.
Group Membership Change History	Shows the changes over time to group memberships. you can filter on specific groups and choose a date range for the changes included in your report. You must have group membership collection enabled in your discovery in order to have data for this report.
NTFS Change History	Shows the changes made over time to the selected NTFS objects (files, folders, and shares). You can filter on domains and select specific computers. You can select a date range for the changes included in your report.
Registry Change History	Shows the changes made over time to registry keys and values for the selected computers. As changes are collected, they are grouped into types, allowing you to report on specific activity. You can select a date range for the changes included in your report.
SQL Server Change History	Shows the changes made over time to the selected SQL servers. You can filter on SQL instances. As changes are collected, they are grouped into types, allowing you to report on specific activity. You can select a date range for the changes included in your report.

Computer Reports

The following table outlines the computer reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports. For each report, you must specify the domains on which you want to report, and include at least one computer from one of the specified domains.

- TIP:** If you include many or all computers in a selected domain, the amount of data in your report can result in a longer report generation time, and lengthy reports. You may find it helpful to create several smaller reports.
- NOTE:** If you are reporting on a NetApp filer, the available data is the general properties of the system, volumes, share, and group information.

Table 3. Computer Reports

Report Name	Description
Permissions	
Printer Permissions	Shows all the printer permissions for the selected computers and printers. You can filter on specific accounts.
Service Permissions	Shows all the service permissions for the selected computers and services. You can filter on specific accounts.
Share Permissions	Shows the permissions for all shares on the selected computers. You can specify the shares you are interested in and you can filter on the type of share or specific accounts.
Share Permissions for Account	Shows share permissions, including permissions derived through group membership, for the selected computers and the selected account. You can specify the shares you are interested in.
Share Permissions with Membership	Shows all the share permissions for the selected computers and shares. If permissions are derived from membership in a group, the membership path of the permission is shown. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both. You can filter the results by supplying a specific list of accounts to look for in the DACLs, and specific organizational units. Contains a parameter to include nested group memberships and options on how they are displayed in the report. For more information, see The Expand Nested Groups Parameter on page 37.
Other	
Computer Advanced Auditing Policies	Shows the computer advanced auditing policies for the selected computers.
Computer BIOS Information	Shows the BIOS information for the selected computers.
Computer Information	Shows the general attributes of the selected computers, such as the operating system information. You can filter the report by server type or operating system.
Computer Network Adapter Information	Shows the network adapter information for the selected computers.
Computer Physical Memory Information	Shows the physical memory information for the selected computers.
Computer Policies	Shows the computer policies for the selected computers.
Computer Security Identifiers (SIDs)	Shows computer security identifiers (SIDs) for the selected computers.
Computer Security Options	Shows the computer security options for the selected computers.
Computer Services	Shows information about all installed services for the selected computers. You can filter the report by service status.
Computers With Less Than 1 GB of Free Disk Space	Shows all the computers with less than 1 GB of free disk space.
Computers With Specific IP Address	Shows computer information for the selected IP addresses.
DNS Server Information	Shows all the DNS settings for the selected DNS Servers.
Dynamic Host Configuration Protocol (DHCP) Service	Shows DHCP service information for the selected computers.
Event Logs	Shows the event log settings for a computer. You can filter on the type of event log.
Exchange Service	Shows Exchange Service information for the selected computers.
Group Membership by Local Account	Shows all groups to which the selected computer accounts belong. You can filter on selected computers and accounts (user or group).

Table 3. Computer Reports

Report Name	Description
Hot Fix Information	Shows all the hot fixes applied to the selected computers.
Installed Software Information	Shows all the installed software for the selected computers.
Local Groups	Shows all the local groups for the selected computers. You can filter on specific local groups.
Local Groups with Members	Shows the group membership for the selected computers and groups. Contains a parameter to include nested group members. You can filter on specific groups.
Local Users	Shows all local users for the selected computers. You can filter on specific accounts and the status of accounts. If you want to report on all included users regardless of their account status (locked/unlocked, disabled/enabled), choose No value specified.
Operating System Information	Shows operating system information for the selected computers.
Printer Information	Shows the printer information for the selected computers or printers. You can filter on printer status.
Remote Access Service	Shows Remote Access Service information for the selected computers.
Services Not Running as System Account	Shows all the services that are not running as the system account for the selected computers.
Share Information	Shows the share information for the selected computers. You can filter on type of share.
User Profile Information	Shows all user profile information for the selected computers.
User Rights	Shows the user rights assignments for the selected computers. You can filter on the user right, and on specific accounts.
Volume Statistics	Shows the statistics for each volume for the selected computers.
Windows Internet Name Service (WINS)	Shows WINS service information for the selected computers.

File Storage Analysis Reports

The following table outlines the File Storage Analysis reports included in Enterprise Reporter. If you are a report user, your administrator may have made some of these reports available in Published Reports.

These reports use information collected from discoveries running over time to assist administrators with data life cycle management by providing storage assessments that can be used for storage planning and pre-migration assessments. Detailed reports provide historical information about resources such as servers, shares, volumes, folders, files, home directories and users.

The File Storage Analysis category displays a default Category Report in the report pane. For more information on setting the parameters of this report, see [Running Category Reports](#) on page 34.

Days Until Critical Capacity

Some File Storage Analysis reports include an estimated number of Days Until Critical Capacity. This estimate is calculated using the following formulae:

- $W = \text{Sum } U / \text{Sum } D$
Based on the most recent 25% of discoveries.
- $Y = ((Rt * C/100) - Ru) / W$

Where:

U = Used Space Changed between last two runs
D = No. of Days between the last two runs

W = Weighted Average
 Y = Days until critical capacity
 Rt =Recent Total Size
 Ru = Recent Used Size
 C = Critical Capacity Percent

The calculation is restricted to the discovery runs in the last 1 year. If the last discovery run is more than a year ago, **No data found** is displayed in the report.

Table 4. File Storage Analysis Reports

Report Name	Description
Capacity Planning	
Capacity Planning	Shows storage growth and highlights any areas of critical capacity across your enterprise. NOTE: Growth trends are based on historical collections. If multiple collections are not available for comparison, growth projections are not available. This report is useful for evaluating your enterprise when capacity planning and for assessing servers during migration projects. It serves as an integral part of storage administration activities. You can drill down through the server name and the user name to view more detailed reports. A line graph displays the total enterprise growth by displaying the total amount of used space for all servers.
Server Capacity	Shows server capacity information. You can specify the percentage of used space that determines if a server is reaching critical capacity. You can drill down through the server name to view the Server Details report. NOTE: Estimated Days Until Critical Capacity indicates how many days it is expected to take for the server to reach the value set as critical capacity (a default of 80%) based on the current analysis of data increase per day. For more information, see Days Until Critical Capacity on page 13. This report highlights servers that may be running out of disk space so that action can be taken. You can also use this report during server consolidation project planning to determine which servers to migrate first. A bar chart displays the top 10 servers sorted by days until critical capacity and indicates the percentage of used and free disk space.
Server Details	Shows server details with volume and share usage information for the selected servers. You can drill down through the logical disk or the share name to view detailed reports. This report is useful for determining your consolidation approach and for capacity planning. A pie chart displays the percentage of used and free disk space.
Server Growth	Shows server growth information for the selected server. Growth details are sorted by dates of discovery runs. NOTE: Note: Growth trends are based on historical collections. If multiple collections are not available for comparison, growth projections are not available. This report allows you to track the percentage of used space over time for servers and provides a snapshot of used and available space for each time the discovery was run. This report is useful for evaluating servers when planning migration projects and serves as an integral part of server administration.
Server Summary by Domain	Shows the total, used, and free disk space on each server in the selected domains. Servers are grouped by domain and sorted by server name. You can drill down through the server name to view the Server Details report. The Server Summary by Domain report is of critical importance when planning your consolidation projects since it provides the data volume information you can use to determine the scope of a consolidation project.

Table 4. File Storage Analysis Reports

Report Name	Description
Top Volumes	Shows top volumes sorted by used space. You can drill down through the server name and the logical disk name to view more detailed reports. A bar chart helps you visually compare the used space on the volumes.
Volume Capacity	Shows volume capacity information. You can specify the percentage of used space that is used to determine if a volume is reaching critical capacity. You can drill down through the server name and the logical disk name to view more detailed reports. Identifying the volumes can help you create capacity projections, determine critical volumes for file cleanup or archiving activities, or plan an approach for server consolidation projects. A bar chart indicates the top 10 volumes sorted by days until critical capacity and indicates the percentage of used and free space.
Volume Details	Shows the volume details for the selected servers. You can also drill down through the logical disk to view a file summary for the volume. This report helps with ongoing capacity planning such as identifying volumes where disk space optimizations (cleanup, compression, or file offloading) are required. You can also use this report during server consolidation project planning to determine which servers and volumes to migrate first. A pie chart displays the percentage of used and free disk space.
Files and Folders	
File Categories	Shows details on the file categories that are used to group files in Enterprise Reporter. Lists the default types of files contained in each category. A file category contains various types of files or other file categories. See also, File Categories on page 17.
File Category Details	Shows the file extensions that are included in the selected category on the selected servers. Categories are sorted by size. You can drill down through a file extension to view the File Information by Extension report. This report is useful for determining exactly what type of files are using storage space when you plan for future storage allocation. A bar chart displays the top 10 file extensions in the category based on size. For a summary of file categories, see File Categories on page 17.
File Summary	Shows file summary information for the selected servers and volumes. You can drill down through the section titles to view more detailed reports. This report is useful for estimating migration schedules since the time needed to migrate data in large files is significantly less than the time needed to migrate the same amount of data in small files. A bar chart displays the number of files in each file size grouping. Another bar chart displays the actual space consumed by the files in each file size grouping.
Files by Category	Shows files grouped into pre-defined categories that are sorted by size. You can drill down through the file category name to view a detailed report of files in the category. This report is useful for identifying the files that you want to remove or migrate to a different storage location. A bar chart displays the categories sorted by size. For a summary of file categories, see File Categories on page 17.
Folder Categories	Shows details on the folder categories that are used to group folders in Enterprise Reporter. Lists the default folder paths contained in each category and describes the types of files typically found in the folders. For a summary of folder categories see Folder Categories on page 19.
Folders by Category	Shows folders grouped in pre-defined categories that are sorted by used space. This report is useful for identifying groups of folders that you want to remove or migrate to a different storage location. A bar chart displays the amount of used space per category. For a summary of folder categories see Folder Categories on page 19.

Table 4. File Storage Analysis Reports

Report Name	Description
Storage Cleanup	Shows storage areas across your enterprise where you can potentially reclaim space through data cleanup or by migrating files to different storage locations. The report is based on all completed server discoveries. You can drill down through the server name in each section to view more detailed reports. This report is useful for assessing your current storage needs prior to migration and as a part of regular data cleanup operations. A pie chart displays the total amount of space recommended for cleanup on all servers.
Top File Extensions	Shows top file extensions sorted by size. You can drill down through any file extension to view the File Information by Extension report. A bar chart displays up to the top 10 file extensions sorted by size.
Home Directories	
Home Directory Details	Shows home directory details for the selected servers. This report can be used for planning home directory updates by identifying the users who are consuming space on the server.
Home Directory Summary	Shows home directory summary information. The report is based on all completed server discoveries. You can drill down through the server name or the number of home directories to view more detailed reports. A bar chart displays the total amount of space used by home directories on each server.
Top Home Directories	Shows top home directories sorted by size. You can drill down through the server name to view the Server Details report. This report can be used to prepare for home directory migrations, to maintain storage quotas, and for storage management activities. A bar chart displays the top home directories sorted by size.
Shares	
Share Details	Shows share details for the selected servers. This report can be used during server consolidation project planning to determine which server shares to migrate first.
Share File Details	Shows file details for the selected shares. This report is valuable when planning for data reorganization or preparing for storage consolidation. NOTE: Share file detail information is only available if Computer and NTFS permission discovery collections that include the selected shares have been completed.
Share Summary	Shows share summary information. The report is based on all completed server discoveries. You can drill down through the server name or the number of shares to view more detailed reports. This report is useful for ongoing share management as well as preparing for share migration in server consolidation projects. A bar chart displays the total amount of space used by shares on each server.
Top Shares	Shows top shares sorted by size. You can drill down through the server name and the share name to view more detailed reports. This report is useful for ongoing data assessment, for planning server consolidation projects, or for determining if specific users are outside acceptable levels of disk space usage. A bar chart displays the top 10 shares sorted by size.
Users	
Top Users	Shows the top users using the most space. This report is useful for analyzing user storage needs and for quota management activities. A bar chart displays up to the top 10 users sorted by size.

Table 4. File Storage Analysis Reports

Report Name	Description
User Growth	<p>Shows user storage growth over time. User growth details are sorted by dates of discovery runs.</p> <p>NOTE: Growth trends are based on historical collections. If multiple collections are not available for comparison, growth projections are not available.</p> <p>This report is useful for identifying users with the fastest growing storage needs over time. The report provides a snapshot of the amount of storage used by the user each time the discovery was run. Use the report to evaluate user storage needs when planning consolidation projects and as an integral part of user storage management activities. A line graph shows the size of storage over time for the user on the server.</p>
Other	
File Storage Analysis Overview	Shows a high-level summary of storage information for your network and highlights immediate storage needs to be addressed. The overview is based on all completed file storage analysis discoveries. You can drill down through the server name, categories, extensions and users to view more detailed reports.

File Categories

The following table outlines the file extensions that are grouped into each file category.

Table 5. File Categories

File Category Name	Category Description	File Extensions	
Against Policy	Files Categories from this table that violate the enterprise file storage policy.	Media Files	Wasted Space Files
All Media Files	File Categories from this table that contain image, audio, video, or internet information.	Graphic Files Internet Files	Movie Files Sound Files
Application Files	Files that contain executables and assemblies.	.app .bat .cgi .com .exe	.jar .pif .vb .wsf
Compressed Files	Files that are compressed using ZIP compression.	.7z .rar	.zip .zipx
Data Files	File types used to identify formatted data.	.csv .dat .gbr .sdf	.tar .vcf .xml
Database Files	File types used to identify database queries, data, and log files.	.accdb .db .dbf	.mdb .pdb .sql
Disk Image Files	File types used to identify virtual disks and disk images.	.bin .cue .iso	.mdf .vcd

Table 5. File Categories

File Category Name	Category Description	File Extensions	
Document Files	File types created by the Microsoft Office® suite of programs.	.doc .docx .indd .mdb .odb .odt .pages .pct .pdf .pps	.ppt .pptx .rtf .tex .txt .wpd .wps .xls .xlsx
Email Files	File types used to identify messages and indexes created by various email programs.	.eml .idx .mbx .msg	.pab .pst .wab
Graphic Files	File types produced by graphic software tools, digital photo software, and software that captures documents as electronic images.	.ai .al .al3 .al4 .al5 .bmp .eps .flm .gif .icd .jpe .jpg .pcd .pct .pcx .pdd .pdf .pdp	.pic .png .pnp .ps .psd .pspimage .pxr .raw .rle .sct .swf .tga .thm .tif .tiff .vda .vst
Movie Files	File types used to identify digital animation files, interactive audio/visual files, and media player files.	.asf .asx .avi .m1v .m4v .mov .mp2 .mp4 .mpa .mpe .mpeg	.mpg .qt .ram .rm .rmx .rt .smi .swf .viv .vob .wmv
Paging Files	Files used to define virtual memory settings for the server.	hiberfil.sys	pagefile.sys

Table 5. File Categories

File Category Name	Category Description	File Extensions	
Sound Files	Files types used to identify digital and audio files.	.afic .agp .aif .aiff .au .iff .jpa .m3u .m4a .mid	.mp3 .mp4 .mpa .pps .ra .snd .wav .wax .wma .wvx
System Files	File types used to identify by operating system files such as driver files and image files.	.cab .cpl .cur .dll .dmp	.drv .ico .lnk .sys
Temporary Files	File types used to identify temporary files.	.bak .dmp .log	.tmp -\$.*
Unknown File Extensions	File extensions that are not categorized.		
Wasted Space	File Categories from this table that may be needlessly using storage space.	Temporary Files	Movie Files
Web Files	File types that identify web site files such as html files, cascading style sheet files, browser cookie files, and graphic files.	.asp .aspx .cer .cfm .csr .css .htm	.html .js .jsp .mht .php .rss .xhtml

Folder Categories

The following table outlines the folder paths that are grouped into each folder category.

Table 6. Folder Categories

Folder Category Name	Category Description	Folder Paths
Applications	Folders typically used to store application program files and settings.	\Applications \Program Files \Program Files (x86)
Exchange Data	Folders that contain Microsoft Exchange Server messaging data files.	\Exchsrvr \Program Files\Exchsrvr
Home Directories	Folders that contain user home directories.	\Home

Table 6. Folder Categories

Folder Category Name	Category Description	Folder Paths
Operating System	Folders that contain Microsoft Windows operating system files.	\WINNT \WINNT351 \WINNT4 \WINNT40 \WINNT5
Oracle Database Data	Folders that contain Oracle database data files.	\OraData \OraNT \OraWin95
Recycle Bin	Folder that temporarily stores deleted files and folders before they are permanently erased.	
Share Point Portal	Folders that contain Microsoft SharePoint Portal Server document management data files.	\Program Files\Common Files\Microsoft Shared\MSSearch \Program Files\Common Files\Microsoft Shared\Web Storage System \Program Files\SharePoint Portal Server
SQL Database	Folders that contain Microsoft SQL Server files such as database engine, client components, and data files.	\MSSQL \MSSQL2000 \MSSQL6 \MSSQL7
SQL Server Database	Folders that contain Microsoft SQL Server data files.	\MSSQL\Data \MSSQL2000\Data \MSSQL6\Data \MSSQL7\Data
Temporary Data	Folders that are used to store temporary files.	\Temp \WINNT\Temp
Web	Folders that contain files used in web sites.	\inetPub

Microsoft SQL Reports

The following table outlines the Microsoft SQL[®] reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports.

Table 7. Microsoft SQL Reports

Report Name	Description
Databases	
SQL Database Objects	Shows all SQL database objects.
SQL Databases	Shows all SQL databases.
Permissions	
Account Permissions for SQL Database Objects	Shows the direct or indirect database object permissions for the selected accounts.

Table 7. Microsoft SQL Reports

Report Name	Description
SQL Database Object Permissions	Shows all SQL database objects and their permissions.
SQL Database Schema Permissions	Shows all database schemas and their assigned permissions on the database.
Roles and Users	
SQL Database Role Membership	Shows membership for each SQL server® role.
SQL Database Role Membership by Account	Shows all database roles of which the selected accounts are direct or indirect members.
SQL Database Users	Shows all SQL database users. If you choose to expand groups, membership of the groups is displayed. Contains a parameter to include nested group memberships and options on how they are displayed in the report. For more information, see The Expand Nested Groups Parameter on page 37.
SQL Logins	Shows all SQL logins.
SQL Server Role Membership by Account	Shows all server roles of which the SQL Server® logins are direct or indirect members.

NTFS Reports

The following table outlines the NTFS reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports. For each report, you must include at least one computer, and one path on that computer. Once you have included a path, you can exclude part of the path.

- i **TIP:** If you include many or all computers or paths, the amount of data processed for your reports can result in a longer report generation time and lengthy reports. You may find it helpful to create several smaller reports.

Wildcard usage: You can use wildcards when specifying computers, paths and owners. Use an asterisk (*) for multiple characters, or a question mark (?) for a single character.

Table 8. NTFS Reports

Report Name	Description
Files	
Compressed Files	Shows compressed files on the selected computers.
Duplicate File Details	Shows duplicate files on the selected computers. You can specify a root folder from which the duplicate file check will begin.
Extended File Information	Shows the extended file information (including the file owner) for the selected computers and paths. You can filter the results by providing a list of folder owners.
File Information by Extension	Shows files on the selected computers grouped by file extension.
Files Created in Last (N) Days	Shows all files created in last (N) days for the selected computers grouped by date created.
Files Created in Last (N) Days grouped by Parent Path	Shows all files created in last (N) days for the selected computers grouped by parent path.
Files Created within Date Range	Shows all files created within the specified date range for the selected computers grouped by date created.
Files Created within Date Range grouped by Parent Path	Shows all files last accessed in last (N) days for the selected computers grouped by date last accessed.
Files Larger than a Specific Size	Shows all files for the selected computers that are larger than a specific size grouped by parent path.
Files Last Accessed in Last (N) Days	Shows all files last accessed in the last (N) days for the selected computers grouped by date last accessed.
Files Last Accessed in Last (N) Days grouped by Parent Path	Shows all files last accessed in last (N) days for the selected computers grouped by parent path.
Files Last Accessed within Date Range	Shows all files last accessed within the specified date range for the selected computers grouped by date last accessed.
Files Last Accessed within Date Range grouped by Parent Path	Shows all files last accessed within the specified date range for the selected computers grouped by parent path.
Files Modified in Last (N) Days	Shows all files modified in last (N) days for the selected computers grouped by date modified.
Files Modified in Last (N) Days grouped by Parent Path	Shows all files modified in last (N) days for the selected computers grouped by parent path.
Files Modified within Date Range	Shows all files modified within the specified date range for the selected computers grouped by date modified.
Files Modified within Date Range grouped by Parent Path	Shows all files modified within the specified date range for the selected computers grouped by parent path.
Files Older Than a Year	Shows files that have not been accessed in a year on the selected computers.

Table 8. NTFS Reports

Report Name	Description
Files with Long Paths	Shows details for files with a path greater than 255 characters.
General File Information	Shows general file information for the selected computers and paths – including the file attributes, date and time information, path, and size.
General File Information by Folder Depth	Shows the general file information filtered by folder depth. The starting folder level and subsequent depth are determined by the collection options and how the paths are stored. Your Administrator may be collecting files and folders through the administrative share or a network share. You can choose the level of folder depth to include. The folder level value will start from zero. Examining the path of C:\FolderA\FolderB, C:\ is 0 levels deep. FolderA is 1 level deep. FolderB is 2 levels deep.
Orphaned Files	Shows files on the selected computers with unknown ownership.
Folders	
Extended Folder Information	In addition to the general folder information, shows the folder owner for the selected computers and paths. You can filter the results by providing a list of file owners.
Folders Created in Last (N) Days	Shows all folders created in last (N) days for the selected computers grouped by date created.
Folders Created in Last (N) Days grouped by Parent Path	Shows all folders created in last (N) days for the selected computers grouped by parent path.
Folders Created within Date Range	Shows all folders created within the specified date range for the selected computers grouped by date created.
Folders Created within Date Range grouped by Parent Path	Shows all folders created within the specified date range for the selected computers grouped by parent path.
Folders Modified in Last (N) Days	Shows all folders modified in last (N) days for the selected computers grouped by date modified.
Folders Modified in Last (N) Days grouped by Parent Path	Shows all folders modified in last (N) days for the selected computers grouped by parent path.
Folders Modified within Date Range	Shows all folders modified within the specified date range for the selected computers grouped by date modified.
Folders Modified within Date Range grouped by Parent Path	Shows all folders modified within the specified date range for the selected computers grouped by parent path.
General Folder Information	Shows general folder information for the selected computers and paths – including the folder attributes, date and time information, path, and size.
General Folder Information by Folder Depth	Shows the general folder information filtered by folder depth. The starting folder level and subsequent depth are determined by the collection options and how the paths are stored. Your Administrator may be collecting folders through the administrative share or a network share. You can choose the level of folder depth to include. The folder level value will start from zero. Examining the path of C:\FolderA\FolderB, C:\ is 0 levels deep. FolderA is 1 level deep. FolderB is 2 levels deep.
General Folder Information groups by Parent Path	Shows the general folder information for the selected computers grouped by parent path.
General Folder Information grouped by Size	Shows the general folder information for the selected computers grouped by size.

Table 8. NTFS Reports

Report Name	Description
Permissions	
File Permissions	Shows the list of ACEs in the DACL for all files on the selected computers and paths. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both. You can filter the results by supplying a specific list of accounts to look for in the DACLs, and specific organizational units.
File Permissions for Account	Shows file permissions for the selected account, including permissions derived through group membership. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both.
File Permissions with Membership	Shows the list of ACEs in the DACL for all files on the selected computers and paths, including the first level of group members for any group given permissions. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both. Contains a parameter to include nested group memberships and options on how they are displayed in the report. For more information, see The Expand Nested Groups Parameter on page 37. You can filter on specific groups.
File and Folder Permissions with Differences	Shows the parent and child permission differences between the selected files and folders.
Files by Owner	Shows all files for the selected computers and owners.
Folder Permissions	Shows the list of ACEs in the DACL for all folders on the selected computers and paths. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both. You can filter the results by supplying a specific list of accounts to look for in the DACLs, and specific organizational units.
Folder Permissions for Account	Shows folder permissions for the selected account, including permissions derived through group membership. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both.
Folder Permissions with Membership	Shows the list of ACEs in the DACL for all folders on the selected computers and paths, including the first level of group members for any group given permissions. You can choose to show only permissions inherited from a parent, only explicit permissions or to show both. You can filter the results by supplying a specific list of accounts to look for in the DACLs. You can choose whether or not you want to include the members of the Domain Users group. Since this can be a very large group, you may wish to exclude it. If you have included the Domain Users group, this report can take longer to generate. Contains a parameter to include nested group memberships and options on how they are displayed in the report. For more information, see The Expand Nested Groups Parameter on page 37. You can filter on specific groups.
Folders by Owner	Shows all folders for the selected computers and owners.

Table 8. NTFS Reports

Report Name	Description
Groups with No Permissions on Any Computer	Shows groups that do not have permissions, or permissions derived through group membership, for any of the files or folders on any of the selected computers. If the selected computers are in more than one domain, all groups from those domains will be verified. If a group has permissions on any of the selected computers, that group will be excluded from the report. When there are 2 (or more) computers from the same domain (for example, Computer A and Computer B), all groups in their domain are analyzed and the results will be as follows: If a group has permission on Computer A but not on Computer B, it will not be in the report. If a group does not have permission on either Computer B or on Computer A, it will not be in the report. If a group does not have permission on either Computer A or on Computer B, it will be in the report.
Groups with No Permissions on Files or Folders	Shows groups that do not have permissions, or permissions derived through group membership, for any of the files or folders on the selected computers. If the selected computers are in more than one domain, all groups from the domains will be verified. If a group does not have any permissions on more than one of the selected computers, that group will be shown under each of those computers.
User Permissions on Folders	Shows the user permissions on the selected folders including permissions derived through group membership.
Other	
File and Folder Summary	Shows the total number of files and folders collected per computer.
NTFS Object Attributes	Shows the general file and folder information for the selected computers and paths. This report combines the General File Information and General Folder Information reports for your convenience.

Registry Reports

The following table outlines the Registry reports included in the Report Library. If you are a report user, your administrator may have made some of these reports available in Published Reports.

Table 9. Registry Reports

Report Name	Description
Registry Keys and Values	Shows the registry keys and their associated values for selected computers. You can filter on specific keys.
Registry Permissions	Shows all registry permissions for the selected computers.

Report Types Included in Enterprise Reporter

The report types included in Enterprise Reporter are used to determine what fields can be included in each report. A report can only contain fields from one report type. For more information on editing existing reports, see [Editing Reports](#) on page 54. For more information on creating new reports, see [Creating New Reports](#) on page 67.

The following tables outline each category of report types included in Enterprise Reporter Report Manager.

Active Directory® Report Types

Table 10. Active Directory® Report Types

Report Type	Description
Account Membership	Provides information on domain accounts and the groups of which they are a member. Contains fields for the domain group member as well as its related domain and organizational unit.
Accounts	Provides information on accounts in an Active Directory® domain. Contains fields for the domain account as well as its related domain and organizational unit. Domain accounts can be users and groups.
Change History	Provides a list of changes made over time to all objects collected in an Active Directory® domain.
Computers	Provides information on computers in an Active Directory® domain. Contains fields for the domain computer as well as its related domain and organizational unit. Contains only information retrieved from Active Directory®. For physical computer fields, please select the Computer | Computer report type.
Contacts	Provides information on contacts in an Active Directory® domain. Contains fields for the domain contact as well as its related domain and organizational unit.
Deleted Objects	Provides information on objects in the Deleted Objects Container in an Active Directory® domain.
Domain Controllers	Provides information on domain controllers in an Active Directory® domain. Contains fields for the domain controller as well as its related domain and organizational unit.
Domains	Provides information on an Active Directory® domain.
Group Members	Provides information on domain groups and their members. Contains fields for the domain group, its related domain and organizational unit as well as the member accounts. Domain user and domain group fields are available for the member account as well as an option to expand the membership.
Groups	Provides information on groups in an Active Directory® domain. Contains fields for the domain group as well as its related domain and organizational unit.
Object Permissions	Provides permission information on Active Directory® objects. Contains fields for the domain object, the permission, the permissioned account as well as its related domain and organizational unit. Domain user and domain group fields are available for the permissioned account.
Organizational Units	Provides information on organizational units in an Active Directory® domain.
Published Printers	Provides information on printers published in an Active Directory® domain. Contains fields for the printer as well as its related domain and organizational unit.
Published Shares	Provides information on shares published in an Active Directory® domain. Contains fields for the share as well as its related domain and organizational unit.
Sites	Provides information on sites in an Active Directory® domain.

Table 10. Active Directory® Report Types

Report Type	Description
Trusts	Provides information on trusts in an Active Directory® domain.
Users	Provides information on users in an Active Directory® domain. Contains fields for the user as well as its related domain and organizational unit.

Common Objects Report Types

Table 11. Common Objects Report Types

Report Type	Description
Accounts	Provides information on accounts. Accounts can be users, groups, computers, or contacts.
Change History	Provides a list of changes made over time to group memberships.

Computer Report Types

Table 12. Computer Report Types

Report Type	Description
Account Membership	Provides information on computer accounts and the groups of which they are a member. Contains fields for the computer group member and its related computer.
Addresses	Provides information on computer IP addresses. Contains fields for the IP address and its related computer.
Advanced Auditing	Provides information on computer advanced audit policy configuration settings. Contains fields for the policy and its related computer. Fields are organized into advanced audit policy categories for simpler selection. When Advanced Audit Policy Configuration settings are being used the "Force audit policy subcategory settings to override audit policy category settings" policy setting must be enabled, this field is available in Security Options Audit.
Change History	Provides a list of changes made over time to all computer objects collected.
Computer	Provides information on physical computers.
DNS Zones	Provides information on DNS zones for a computer. Contains fields for the DNS zone and its related computer.
Event Logs	Provides information on event logs for a computer. Contains fields for the event log configuration and its related computer.
Hotfixes	Provides information on hotfixes on a computer. Contains fields for the hotfix and its related computer.
Installed Software	Provides information on the installed software on a computer. Contains fields for the installed software and its related computer.
Local Group Members	Provides information on local groups and their members. Contains fields for the local group, its related computer and the group member as well as an option to expand group membership.
Local Groups	Provides information on local groups on a computer. Contains fields for the local group and its related computer.
Local Users	Provides information on local users on a computer. Contains fields for the local user and its related computer.

Table 12. Computer Report Types

Report Type	Description
Network Configurations	Provides information on the network configuration of a computer. Contains fields for the network adapter as well as its related network protocol and computer.
Printer Permissions	Provides permission information on computer printers. Contains fields for the computer, the printer, the permission and the permissioned account.
Printers	Provides information on printers on a computer. Contains fields for the printer and its related computer.
Profile Information	Provides user profile information on a computer. Contains fields for the profile and its related computer.
Security Options	Provides information on security options on a computer. Contains fields for each security option and its related computer. Fields are organized into security option categories for simpler selection.
Security Policies	Provides information on computer security policies including audit, lockout and password policies. Contains fields for the security policy and its related computer.
Service Permissions	Provides permission information on computer services. Contains fields for the computer, the service, the permission and the permissioned account.
Services	Provides information on services on a computer. Contains fields for the service as well as its related service account and computer.
Service with Dependencies	Provides information on services on a computer including the service dependencies. Contains fields for the service as well as its related service dependencies, service account and computer.
Share Permissions	Provides permission information on shares on a computer. Contains fields for the computer, the share, the permission, and the permissioned account. Domain user, domain group, local user and local group fields are available for the permissioned account including organizational unit. Note: Domain user and domain group information only available if an Active Directory® collection has been completed.
Share Permissions with Nested Accounts	Provides permission information on shares on a computer. Contains fields for the computer, the share, the permission and the permissioned account as well as an option to expand the accounts membership.
Shares	Provides information on shares on a computer. Contains fields for the share and its related computer.
User Rights	Provides information on user rights on a computer including the accounts assigned user rights. Contains fields for the user right as well as its related assigned accounts and computer.
Volumes	Provides information on the volumes on a computer. Contains fields for the volume and its related computer.

File Storage Analysis Report Types

Table 13. File Storage Analysis Report Types

Report Type	Description
File Category Details	Provides the most recent information on file distribution by category. Contains fields for the file category name, description, file count and size.
File Category History	Provides historical information on file distribution by category. Contains fields for the file category name, description, file count and size.

Table 13. File Storage Analysis Report Types

Report Type	Description
File Date Details	Provides the most recent information on file distribution by last access date.
File Date History	Provides historical information on file distribution by last access date.
File Extension Details	Provides the most recent information on file distribution by file extension. Contains fields for the file extension name, description, type, file count and size.
File Extension History	Provides historical information on file distribution by file extension. Contains fields for the file extension name, description, type, file count and size.
File Size Details	Provides the most recent information on file distribution by size.
File Size History	Provides historical information on file distribution by size.
Folder Category Details	Provides the most recent information on a folder category.
Folder Category History	Provides historical information on a folder category.
Home Directory Details	Provides the most recent information on a server's home directories.
Home Directory History	Provides historical information on a server's home directories.
Owner Details	Provides the most recent information on file or folder owner.
Owner History	Provides historical information on file or folder owner.
Server Details	Provides the most recent information on a server.
Server History	Provides the historical information on a server.
Share Details	Provides the most recent information on a server's shares.
Share History	Provides historical information on a server's shares.
Volume Details	Provides the most recent information on a server's volumes.
Volume History	Provides historical information on a server's volumes.

NTFS Report Types

Table 14. NTFS Report Types

Report Type	Description
Change History	Provides a list of changes made over time to files and folders collected.
Duplicate File Details	Provides the most recent information on duplicate files. Contains fields for the duplicate file and its related computer.
File and Folder Information	Provides information on files and folders on a computer. Contains fields for the file or folder and its related computer.
File and Folder Permission Differences	Provides parent and child permission differences on files and folders on a computer. Contains fields for the computer, the file or folder, the permission and the type of difference from the parent permission.
File and Folder Permissions	Provides permission information on files and folders on a computer. Contains fields for the computer, the file or folder, the permission and the permissioned account. Domain user, domain group, local user and local group fields are available for the permissioned account including organizational unit. Note: Domain user and domain group information only available if an Active Directory® collection has been completed.

Table 14. NTFS Report Types

Report Type	Description
File and Folder Permissions with Nested Accounts	Provides permission information on files and folders on a computer. Contains fields for the computer, the file or folder, the permission and the permissioned account as well as an option to expand the accounts membership.
File Information	Provides information on files on a computer. Contains fields for the file and its related computer.
Folder Information	Provides information on folders on a computer. Contains fields for the folders and its related computer.

Registry Report Types

Table 15. Registry Report Types

Report Type	Description
Change History	Provides a list of changes made over time to registry keys and values.
Keys and Values	Provides information on registry keys and their values on a computer. Contains fields for the registry key as well as its value and related computer.
Permissions	Provides permission information on registry keys on a computer. Contains fields for the computer, the registry key, the permission and the permissioned account.

SQL Server® Report Types

Table 16. SQL Server® Report Types

Report Type	Description
Database	Provides information on databases on a SQL Server®. Contains fields for the database and its related SQL Server®.
Database Change History	Provides a list of changes made over time to databases collected.
Database Object	Provides information on database objects on a SQL Server®. Contains fields for the database objects and its related database and SQL Server®.
Database Object Permission	Provides permission information on database objects on a SQL Server®. Contains fields for the SQL Server®, the database, the database object, the permission, the grantor and the grantee.
Database Role	Provides information on database roles on a SQL Server®. Contains fields for the role and its related SQL Server® and database.
Database Role Membership	Provides information on databases roles and their members. Contains fields for the SQL Server®, the database, the database role and the role members.
Database Role Membership by Account	Provides information on databases roles and their members. Contains fields for the role member name and membership path.
Database Schema	Provides information on database schemas on a SQL Server®. Contains fields for the schema and its related SQL Server® and database.

Table 16. SQL Server® Report Types

Report Type	Description
Database Schema Permission	Provides permission information on database schemas on a SQL Server®. Contains fields for the SQL Server®, the database, the database schema, the permission and the principal account.
Database User	Provides information on database users on a SQL Server®. Contains fields for the SQL Server®, the database, the user and the SQL Server® Login.
Login	Provides information on SQL Logins on a SQL Server®. Contains fields for the login and its related SQL Server®.
Permission for Database Objects	Provides permission information on database objects on a SQL Server®. Contains fields for the SQL Server®, the database object and the permission.
Role	Provides information on server roles on a SQL Server®. Contains fields for the server role and its related SQL Server®.
Role Membership	Provides information on SQL Server® roles and their members. Contains fields for the SQL Server®, the role and the members.
SQL Server	Provides information on a SQL Server®.
SQL Server ACEs	Provides permission information on a SQL Server®. Contains fields for the SQL Server® the permission, the grantor and the grantee.
SQL Server Change History	Provides a list of changes made over time to SQL Servers® collected.
SQL Server Role Membership by Account	Provides information on SQL Server® roles and their members. Contains fields for the role member name and membership path.

Configuring Global Settings (System Configuration)

There are several settings on the System Configuration page that you can manage for Enterprise Reporter:

- **Credential Manager**
You can manage credentials for use throughout the system. For more information, see [Using the Credential Manager](#) on page 49.
- **Email settings**
If you are a reporting administrator, you can configure a default SMTP server. This makes it easier for reporting users to configure delivery of reports by email. For more information, see [Configuring a Default SMTP Server](#) on page 41.
- **Knowledge Portal settings**
Knowledge Portal is a cross product online reporting platform. Once Knowledge Portal is deployed, you can configure Enterprise Reporter to enable publishing. Reports can then be published, allowing users to generate reports using a web browser instead of the Report Manager. For more information, see [Configuring Knowledge Portal](#) on page 75.
- **Software Improvement**
This optional program is designed so that Dell can receive anonymous feedback about the features you use, in order to continually improve Enterprise Reporter. No personal information is collected. The performance of the software is not affected.

NOTE: You can opt out of the software improvement program for any component by clearing the appropriate check box in the dialog box.

- **Access Explorer settings**
You can set the duration of the data cache and the maximum rows of records to display on the Explorer tab. By default, the data cache is refreshed automatically every 24 hours. Users can refresh the cache manually at any time. By default, the maximum number of records to display without receiving a warning is 50,000. For more information, see [Configuring Access Explorer](#) on page 78.
- **Time Outs**
You can increase the timeouts for the Enterprise Reporter server. Connection Timeout controls how long the server has to establish a connection to the database, the Command Timeout controls the amount of time available for processing a command on the database, and the Report Command Timeout controls the amount of time allowed for report generation. For more information, see [Troubleshooting Connection Timeouts](#) on page 86.

Running and Scheduling Reports

- [Running Reports](#)
- [Configuring a Default SMTP Server](#)
- [Scheduling Reports](#)
- [Organizing Reports](#)
- [Using the Credential Manager](#)

Running Reports

Running Category Reports

Category reports run and display in the report pane when the category is selected in the treeview. One category equipped with a default category report is File Storage Analysis. For more information, see [File Storage Analysis Reports](#) on page 14.



Showing and Applying Category Report Parameters

To show and apply category report parameters

- 1 While viewing the category report, click **Show Parameters** in the toolbar.
The parameters and a Hide Parameters button are displayed, and the toolbar is hidden.
- 2 Enter the parameter values.
For more information, see [Entering Parameter Values](#) on page 36.
- OR -
Click **Hide Parameters** to hide the parameters and display the toolbar.
- 3 If the parameters have changed, click **Refresh Report** to apply the current parameters.



Change the Category Report View

To change the category report view

- While viewing the category report, click the  View button to view the list of category reports.
- OR -
While viewing the list of category reports, click the  View button to view the category report.

Navigating Within a Category Report

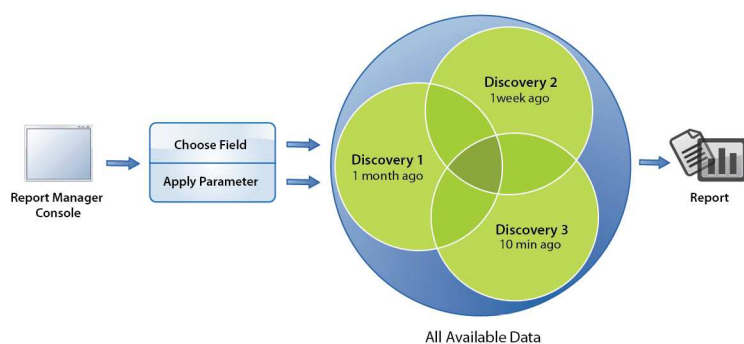
To navigate within a category report

- 1 While viewing the category report, click on links within the report to drill down and view more specific information in associated reports.
- 2 Click the  Next Report or  Previous Report buttons in the toolbar to navigate between reports you have viewed.

Running Regular Reports

When you run a report, it returns data based on the most recent data collected by the discoveries, the selected fields, defined parameters, and any parameter values you enter. Some reports may have required parameters; in this case, the report will not run unless you enter valid parameter values. [Figure 2](#) outlines the source of the data for your report.

Figure 2. Relationship between collected data and a report



Because you are running reports on previously collected data, it may be important to understand the age of the data. Data may come from different discoveries, which were run at different times. Users of the Report Manager may not be aware of when and in what configuration data was collected, as discoveries are administered in the Configuration Manager.


For example, in [Figure 2](#), the generated report relies on data collected by three different discoveries, with different ages of data. If it is important to know how fresh data is, you can add a timestamp to your report. For more information, see [Indicating Data Age on a Report](#) on page 57.

When reports contain date and time values, they are always expressed in the local time zone of the console where the report was generated. You can display this time zone on the report by modifying its layout. For more information, see [Changing the Layout](#) on page 65.

For more information on collecting data, see the Dell Enterprise Reporter Configuration Manager User Guide in the [Technical Documentation](#).

Running Reports or Exporting Reports to CSV from Different Containers

The procedure for running a report or exporting a report to a raw, unformatted CSV file is the same, no matter what container the report is in. The Report Details view provides a breadcrumb trail to make it easy to navigate back through report categories and containers.

-  **TIP:** Only administrators can run reports from the library. It is recommended that you run reports from the My Reports or Published Reports containers.


To run a report or export a report to CSV

- 1 Click a container or category, locate the report card, and click the report name.

- OR -

Expand the treeview as necessary, and select the report.

- 2 If necessary, in the Report Details view, enter the parameter values.

-  **NOTE:** A report cannot be run until all parameter cards have green check marks beside them. Optional parameters have a green check mark, but a required parameter will have a red x until you enter a valid parameter value.

For more information on entering parameters, see [Entering Parameter Values](#) on page 36.

- 3 Click **Run Report**.


The report is displayed to the screen for printing (see [Printing a Report](#) on page 40) or exporting to other formats (see [Exporting a Report to Other Formats](#) on page 40).

- OR -


Click **Export to CSV**.

Provide a name and location for the file, and click **Save**.


Click **Yes** to open the file or click **No** to return to your report.

-  **NOTE:** If your organization has Knowledge Portal deployed, you may be able to run reports online. A reporting administrator must publish the reports first. For more information, see [Publishing Reports to Knowledge Portal](#) on page 75.

Entering Parameter Values

When you run a report, parameter cards are used to filter the data and make your reports more meaningful. These parameter cards are added by the report author, who you can identify from the report description on the report card. For more information, see [Types of Parameters](#) on page 58. All parameters must have  beside them, satisfying the parameter requirements, before you can view the report.

The action you take to enter a parameter value depends on both the type of operator and the type of field you are working with. For example, a field that contains numbers, combined with the *Between* operator, requires you to enter two values, one higher than the other. A field that contains a date and the *Not in the last* operator requires you to either type in or use the spin control to enter a number of days.

Some parameters are required; you must enter values in these in order to run the report. The parameter type is indicated in the top right corner of the parameter card. Required parameters that you have not yet filled in are indicated by . Once you have entered an acceptable value, a green check mark is displayed.

You can choose whether to enter values in an optional parameter. Optional parameters have a green check mark icon regardless of whether a value is provided.

① **NOTE:** Some optional parameters have an additional option to allow you to include all results, effectively ignoring the parameter. For example, using the optional parameter that allows you to select the type of permission you want to include (using the Equals operator), you can:

- Filter the report on specific permission types (provide a value for the parameter)
- Report on objects with no permissions (leave the parameter blank)

Include all permissions in the report (select the Include all results check box)

To enter a parameter value

- In the parameter card, click the text box and type the value.

① **NOTE:** Some parameters support the use of wildcard characters such as entering an asterisk (*) for multiple characters, or a question mark (?) for a single character. For more details on which types of parameters support wildcards, see [Parameter Operators](#) on page 59.

- OR -

If there is a search icon, click and search for the value. For more information, see [Searching for Parameter Values](#) on page 38.

Select a value using the list, radio buttons or other user control.

If a parameter has a list, it indicates that you can choose from values populated from existing data. As you type, Enterprise Reporter automatically searches for the closest match from this list. Date parameters provide a second arrow that shows a calendar you can use to select a date.

If you have added a value you no longer want, select the value from the list and click Remove.

If there is a parameter to expand nested group members, you can specify how they are displayed in the report. For more information, see [The Expand Nested Groups Parameter](#) on page 37.

The Expand Nested Groups Parameter

Some reports have a parameter that allows you to expand nested group members and specify how they are displayed in the report. The five ways you can handle nested groups and their members are as follows:

- Do not expand nested group membership
- Expand inline including members of Domain Users group
- Expand inline excluding members of Domain Users group
- Expand in subreport including members of Domain Users group
- Expand in subreport excluding members of Domain Users group

Optionally you can add more fields for the nested group members to be displayed in the report and save it for future use.

To add more nested group member fields when running a report

- 1 When running a report, click **Add Fields** at the Expand Nested Groups parameter.
- 2 Select the fields you want from the available fields list, and click **Add**. For more information, see [Modifying the Fields to be Included](#) on page 55.
- 3 Click **OK**.
- 4 Complete all required fields.
- 5 Optionally, click **Save parameters as default** to save the fields for the next use of this report.
- 6 Continue with running or exporting this report as usual. For more information, see [Running Reports or Exporting Reports to CSV from Different Containers](#) on page 36.

Searching for Parameter Values

In order to properly define your report, you must choose the values to include in your report. Enterprise Reporter helps with this task by providing a list of currently available values, based on the data that has been collected in your environment. By selecting from a list instead of typing in a value, you can be sure that data exists, and that you have entered the value correctly.

Because there can be large amounts of data available, you can search for the parameter value for any string field. You can enter search phrase, or use the * wildcard character to help narrow down the results. Only the first 500 results are returned; in this case, you need to provide a more refined search term.

To search for a parameter value

- 1 For any string parameter, click the **Search** icon.
Anything you have typed in the parameter value text box becomes the search term if you click the Search icon.
- 2 Enter a search phrase and click **Search**.
If you do not enter a search phrase, and click Search, all results are returned.
- 3 Select the value or values you want, and click **OK**.

Using Saved Parameters

Once you have parameters entered, you can save them as the default parameters for that report. If you already had default parameters saved, they are overwritten with the new values.

When you display the Report Details view, the parameters are already entered, so you can run the report with the default parameters or edit them as needed. If you edit parameters, you can return to the current default parameters at any time.

To save default parameters

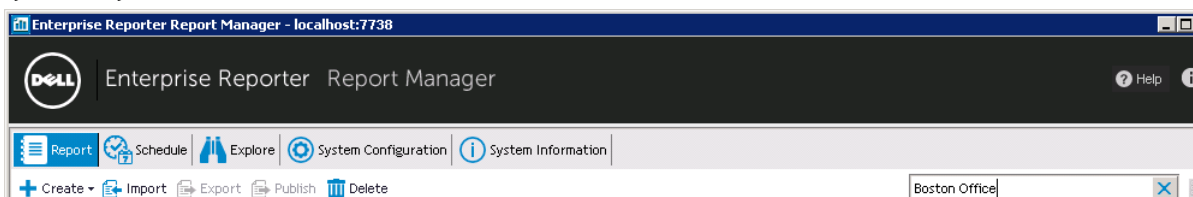
- 1 Open the Report Details view for the report. For more information, see [Running Reports or Exporting Reports to CSV from Different Containers](#) on page 36.
- 2 Enter parameters as needed. For more information, see [Entering Parameter Values](#) on page 36.
- 3 Click **Save parameters as default**.
The parameters overwrite any current default parameters.

To restore default parameters

- 1 Open the Report Details view for report. For more information, see [Running Reports or Exporting Reports to CSV from Different Containers](#) on page 36.
- 2 Click **Restore default parameters**.

Searching for a Report

You can search for reports based on the report name, the author, and text in the report description. Searching is performed within the selected container or category. As you type in the search field, your report list is dynamically narrowed down.



If you type more than one word, the Report Manager looks for either of the words—it creates an OR condition. If you want to search for a phrase, enclose it in quotations. For example, if you search for Boston Office, you will see all reports that have Boston and all reports that have Office. If you search for "Boston Office", you will see all reports that have that exact phrase.

To search for reports

- 1 Click the container or category you want to search.
- 2 In the search box, type a phrase.

To clear a search

- Clear the contents of the search box.
 - OR -
- Click on a different container or category.

Viewing Report Properties

If you want to see how a report was designed, you can open the Edit Report dialog box and examine the settings. If the report is in the Library or Published Reports, you cannot make any changes. See [Editing Reports](#) on page 54 for more information on modifying the report definition.

To see the settings used in creating the report

- 1 Display a report list by clicking a report container or category, then locate the report card and click **Edit**.
 - OR -

Expand the Published Reports or My Reports treeview until you locate the report, then right-click the report and click **Edit Report**.

 - OR -

Run the report, and in the Report Details view, click **Edit Report**.
- 2 View the properties, and click **OK**.
 - You can view the Fields, Parameters, Layout and Query Pages.

Previewing a Report

Preview is a quick way to see what your report will look like. It returns a shortened version of the report, without prompting for parameter values.

To preview a report

- 1 Click a report container.
 - OR -

Expand a report container and select the category containing the report. In the treeview, select the report you wish to preview.
- 2 On the report card for the report, click **Preview**.
- 3 Examine the report and then close the window.

If there is no data in the report, it is possible the relevant data has not yet been collected. For more information, see your Enterprise Reporter administrator or see the Dell Enterprise Reporter Configuration Manager User Guide in the [Technical Documentation](#).

Printing a Report

Once you have generated a report, you can print the entire report, or just specific pages.

To print a report

- 1 Generate the report. (For more information, see [Running Reports or Exporting Reports to CSV from Different Containers](#) on page 36.)

You can change the paper size, margins and orientation by clicking Page Layout.

- 2 Click the **Print** button.
- 3 If necessary, select a printer, set a page range, or a number of copies.
- 4 Click **Print**.

Exporting a Report to Other Formats

After running a report, you can export it to one of the following formats:

- PDF
- HTML
- MHT
- RTF
- Excel
- CSV (with formatting)
For more information on exporting to a raw, unformatted CSV file, see [Running Reports or Exporting Reports to CSV from Different Containers](#) on page 36.
- Text file
- Image File (includes all common image formats).

You can also email your report in any format directly from the report window.

To export a report

- 1 Run a report.
- 2 Click the **Export Document** button to export in the last exported format.

- OR -

Click the **Export Document** drop-down to select the desired format.

To email a report, instead of the Export Document button or arrow, click the Send via Email button or arrow.

- 3 Set the export options and click **OK**.
- 4 Provide a name and location for the file, and click **Save**.
- 5 Click **Yes** to open the file.

- OR -

Click **No** to return to your report.

Configuring a Default SMTP Server

If you are a reporting administrator, and want to make it easier for reporting users to configure email in Enterprise Reporter, you can configure a default SMTP server. This allows reporting users to choose this server when setting up options such as report delivery. You can provide a server that uses anonymous connections, or one that uses authentication. Users can provide their own credentials when they create a schedule.

To configure a default SMTP server

- 1 In the Report Manager, select **System Configuration**.
- 2 Click **Configure SMTP server used by Enterprise Reporter**.
- 3 Enter the server and port, then click **OK**.

You can test the connection to the SMTP server to ensure you have entered the details correctly.

Scheduling Reports

You can create a schedule to run reports. Once you have created the schedule, you can add reports, and set the parameters for the reports. When you are deciding how often to run your reports, make sure you understand how often the data on which you are reporting is collected. Your reporting interval needs to be at least the size of the data collection interval, or there will not be any new information in the reports. See [Running Reports](#) on page 34 for more information on data freshness.

NOTE: You can only schedule reports from your My Reports container.

When you add a report to a schedule, a link is maintained between the originating report and the scheduled version. Any changes to the report definition and layout will be reflected in all scheduled versions. The originating report path is indicated on the scheduled report card.

NOTE: If you change the parameters in the originating report, the scheduled versions are not updated. If you want to use the new parameters, remove the reports from any schedules, and add the new version. For more information, see [Removing Reports from a Schedule](#) on page 48 and [Adding Reports to a Schedule](#) on page 47.

You can add the same report to a single schedule more than once, or to different schedules. This allows you to schedule different versions of the report by providing different parameter values. In order to help you keep track of the various versions, you can provide a description of the parameter values. This description also appears on the scheduled report card. [Figure 3](#) shows this information on the scheduled report card.

Figure 3. A scheduled report card



Creating a Schedule

The first step in scheduling reports is to create a schedule. One schedule can be used for many reports. Reports are deposited in a file share you specify. Additionally you can choose to email a copy of the report to selected users.

- NOTE:** You need to provide credentials in order to generate and deliver reports. Ensure these credentials have write access to the target share. If you want to allow all users of the Report Manager to have access to the target share, you can permission the Reporter_Reporting_Operators and/or the Reporter_Reporting_Admins groups. If you use an account that is not a member of either of these groups, you must manually give the account permission to read the database, otherwise no reports will be generated.

To create a schedule

- 1 On the Schedule tab, click **+ New Schedule**.
- 2 Give your schedule a unique name.
- 3 Enter the schedule details. See [Types of Schedules](#) on page 45.
- 4 Select an account from the Credential Manager.
If the account you want is not on the list, click Add and enter the account, then select it from the list. For more information, see [Using the Credential Manager](#) on page 49.
- 5 Type or browse to the share path where the reports are to be delivered.
If you are typing, use the form \\servername\share.
You can filter in the browser to make it easier to locate a particular share.
If you want to email your reports, see [Delivering Scheduled Reports by Email](#) on page 42.
- 6 Select the format for your report.
For more information on these formats, see [Exporting a Report to Other Formats](#) on page 40. Not all formats are available for scheduled reports.
- 7 To email a copy of the report, select **Send Email** and enter the To and From details. Optionally, modify the Subject and Body of the email message.
For more information on setup and configuration, see [Delivering Scheduled Reports by Email](#) on page 42. For more information on customizing the message, see [Modifying Scheduled Email Messages](#) on page 43.
- 8 Click **OK**.

Delivering Scheduled Reports by Email

You can choose to have all of the reports on a schedule delivered by email. Reports are always delivered to a network share, since some organizations do not allow certain file types to be sent, and restrict the size of attachments.

To configure email, you need to provide an SMTP server. Your administrator may have provided a default server for you to use; otherwise you will need the server name and port number. Unless the SMTP server is configured to accept anonymous connections, you need to provide valid credentials for the SMTP server. The same SMTP server will be used for all schedules. If you change the SMTP settings on one schedule, all other schedules will be automatically updated.

Enterprise Reporter will attempt to email the reports as an attachment. If your email setup does not allow for this, the email will have a link to the share where the reports are located.

To set up email delivery of reports

- 1 Create or edit a schedule.
- 2 In the Delivery area, select **Send Email**.

- 3 If this is your first schedule, configure the mail server.
If you make changes to the mail server configuration, all schedules will be updated.
- 4 In the From field, type the sender's email address.
- 5 In the To field, type all of the recipient's email addresses, separated by a comma or semicolon.
- 6 Optionally, type a subject that clearly indicates the purpose of the reports being emailed.
If the Subject field is left blank, the default subject from the template will be used.
- 7 Optionally, modify the Body of the email message.
For more information, see [Modifying Scheduled Email Messages](#) on page 43.
- 8 Click **OK**.

To configure your mail server for all schedules

- 1 Create or edit a schedule.
- 2 If necessary, select **Send Email**.
- 3 Click **Configure mail server**.
If your administrator has configured a default SMTP server, or if you have previously configured an SMTP server for a schedule, the fields are filled in.
- 4 Enter a server name, port and an account.
For information on adding credentials see [Using the Credential Manager](#) on page 49.
If your SMTP server is configured to accept anonymous connections, you do not need to provide an account.
- 5 Test your connection.
- 6 Click **OK**.

Modifying Scheduled Email Messages

When scheduling reports, one of the Delivery options is to Send Email. When the Send Email option is selected, the NoAttachmentTemplate.xml template is automatically loaded into the Body field as the default message. (For more information, see [Modifying Scheduled Email Templates](#) on page 44.)

You may modify the email message for this schedule, but it is important to note that the email template contains variables and tags that control the content and layout of the email message.

The following options may be used anywhere within the body of the message.

Table 17. Scheduled Email Message Global Variables

Variable	Content
{%report_schedule%}	schedule name
{%network_path%}	path location of scheduled reports
{%filename%}	name of the file containing scheduled reports

Table 18. Scheduled Email Message Formatting Tags

Tag	HTML Layout Equivalent
<body></body>	<body></body>
<static></static>	<p></p>

To create a section that will be repeated for every report in the schedule, use `<repeat>` and `</repeat>` to indicate the beginning and the end of the section.

The following variables and tags may be used anywhere within the repeating section:

Table 19. Scheduled Email Message Repeating Section Variables

Variable	Content
{%name%}	name of report
{%description%}	description of report

Table 20. Scheduled Email Message Repeating Section Formatting Tags

Tag	HTML Layout Equivalent
<code><row></row></code>	<code><tr></tr></code>
<code><plaintext></plaintext></code>	<code><td></td></code>
<code><dynamictext></dynamictext></code>	<code><td></td></code>

An example of an email message using all available variables and tags is shown below.

```
<Body>
  <static>The report schedule "{%REPORT_SCHEDULE%}" has successfully completed. The following reports
  can be found in this location:
    <link>{%NETWORK_PATH%}</link>
  </static>
  <repeat>
    <row>
      <plaintext>Report Name:</plaintext>
      <dynamictext>{%name%}</dynamictext>
    </row>
    <row>
      <plaintext>Description:</plaintext>
      <dynamictext>{%description%}</dynamictext>
    </row>
    <row>
      <plaintext>Filename:</plaintext>
      <dynamictext>{%filename%}</dynamictext>
    </row>
  </repeat>
</Body>
```

Modifying Scheduled Email Templates

You can choose to have all of the reports on a schedule delivered by email (see [Delivering Scheduled Reports by Email](#) on page 42 for more details). The success, failure, or attachment size of the scheduled reports determines which email template is used.


The templates are located in the following directory on the computer where the Enterprise Reporter server is installed:

- Program Files\Dell\Enterprise Reporter\Server\EmailTemplates

Email templates are provided for the following four scenarios:

- A schedule completes successfully and the total size of all reports is less than the maximum of 500KB.
DefaultSchedulingTemplate.xml
DefaultSchedulingTemplate.xslt
- A schedule does not complete successfully.
FailureTemplate.xml
FailureTemplate.xml
- The total size of all reports exceeds the maximum of 500KB so no reports are attached.
NoAttachmentTemplate.xml
NoAttachmentTemplate.xslt
- A schedule is partially complete because one or more reports fail.
PartialCompleteTemplate.xml
PartialCompleteTemplate.xslt

You can use any XML editor to modify the templates (.xml) and their corresponding email style files (.xslt). Some prior knowledge of XML and Extensible Stylesheet Language Transformation will be helpful. For more information, see [Email Template Structure \(.xml\)](#) on page 45.

 **TIP:** Given the precise nature of the content formatting, using an XML editor to validate changes to the email templates and their style files is recommended.

Email Template Structure (.xml)

The template files contain tags such as <EmailTemplate>, <Subject> and <Body>. The attributes and textual content of these tags may be modified. For example, to change the subject of an email template, open the applicable template file and change the content between <Subject> and </Subject>.


To add more information to the email messages, the following tags can be repeated within the same template:

- <static>
- <repeat>
- <plaintext>
- <dynamictext>

Text between the {%. . . %} tags must remain unaltered as they control relative content embedded in the email messages as they are generated. For more information, see [Modifying Scheduled Email Messages](#) on page 43.

Types of Schedules

There are four types of schedules you can create. These are the same as the schedule types you can create to run discoveries in the Configuration Manager.

 **NOTE:** All times are stored in UTC format. They will not be adjusted when your local time changes, such as for Daylight Savings Time.

Run Your Schedule Once

This allows you to run your schedule a single time, at a date and time you provide.

To schedule a single run

- 1 In the Settings area of the Create Schedule dialog box, click **Run Once**.
- 2 In the Start Date field, select the element you want to change, and use the spin arrows to change the value.

Run Your Schedule on a Daily Interval

You can run your schedule every day, or at an interval you choose. For example, if you set the interval to two days, starting on the 22nd day of the month, it will run on the 24th, 26th, 28th and 30th.

The schedule resets at the beginning of the month, so if you have a daily schedule it runs on the first of the month, and then at the set interval. In the above example, after the run on the 30th, the next scheduled runs are the 1st and 3rd of the following month.

To schedule a daily run

- 1 In the Settings area of the Create Schedule dialog box, click **Daily**.
- 2 In the Start Date field, click the drop-down arrow, and use the calendar to select the date and time.
- OR -
In the Start Date field, select the element you want to change, and use the spin arrows to change the value.
- 3 Set the interval for your daily run.

Run Your Schedule on Specified Days of the Week

You can set any number of days of the week, and your discovery will run at the set time on those days.

To schedule a weekly run

- 1 In the Settings area of the Create Schedule dialog box, click **Weekly**.
- 2 In the Start Date field, click the drop-down arrow, and use the calendar to select the date and time.
- OR -
In the Start Date field, select the element you want to change, and use the spin arrows to change the value.
- 3 Select the days on which you want your discovery to run.

Run Your Schedule on a Specified Day of the Month

You can select a certain day of the month to run your discovery. This can either be a calendar day, such as the 1st day of the month, or it can be described, such as the last Friday of the month.

To schedule a monthly run

- 1 In the Settings area of the Create Schedule dialog box, click **Monthly**.
- 2 In the Start Date field, click the drop-down arrow, and use the calendar to select the date and time.
- OR -
In the Start Date field, select the element you want to change, and use the spin arrows to change the value.
- 3 Select the day of the month on which you want your discovery to run.
- OR -
Select the weekly interval and day of the month.

Working with Schedules

Once you have created a schedule, you can add and remove reports, or delete the schedule entirely. When a schedule runs, the reports are generated using the provided parameter values, and are deposited in the designated share. Each time a report is generated, a new file name is created. The file name is composed of the name of the report, an ID to help you identify the report and parameter combination, and the time the report was run. You can run all reports in a schedule any time, without waiting for the next scheduled time.

Reporting administrators have some control over other users' schedules. They can view all schedules for all users, remove reports, and delete schedules entirely. If you are a reporting administrator, this allows you to troubleshoot scheduling issues, and control the volume of reports being generated. Administrators should work with their users to define good scheduling practices if the volume of reports is high.


- ① **MOBILE:** You can view your reporting schedules, and run your schedule or individual reports on your mobile device, using the Enterprise Reporter Mobile IT Pack.

Adding Reports to a Schedule

You can add many reports to a schedule, and you can add a report to as many schedules as you like. You can only add reports from My Reports, so you may need to copy reports from your other containers first. For more information, see [Copying Reports](#) on page 52. Once you add a report, you can enter the parameter values that will be used to generate the report. If you do not enter parameter values, the report contains all available data.

- ① **TIP:** You can add the same report to a single schedule more than once, or to different schedules. This allows you to schedule different versions of the report by providing different parameter values. It is recommended that you use a parameter value description to differentiate between versions of the same report. This description appears on the scheduled report card, and can save you from having to examine the parameter values themselves to identify the contents of the scheduled report. When the report is run, an ID and timestamp is added to the report name, to help you identify the output.
- ① **NOTE:** Once you have scheduled a report, you can run it with the current parameter values by displaying the scheduled report card and clicking Run Now.

To add reports to your schedule

- 1 If necessary, create the schedule. For more information, see [Creating a Schedule](#) on page 42.
- 2 On the Schedule tab, on the schedule card, click  **Schedule Report**.
- 3 Select the reports.
- 4 Click **OK**.
A scheduled report card appears for each selected report.
- 5 Select a scheduled report card.
- 6 Enter the parameter values for all required parameters, and for optional parameters as desired.
If there is a search icon, click and search for the value. For more information, see [Searching for Parameter Values](#) on page 38.
- 7 Type a description.
Use a description that identifies the data that will be included in the report.
- 8 Click **Save**.
If you do not click Save, and navigate away from the scheduled report card, no parameter values will be saved. In this case, your report returns all data, and may take longer to generate.
- 9 Repeat steps 5 through 7 for each report you scheduled.

Removing Reports from a Schedule

You can remove a report from a schedule. This does not delete the report, however you now have to run the report manually, or add it to another schedule.

If you are a reporting administrator, you can remove a report from any user's schedule. This allows you to stop reports that are causing issues, such as taking up too much space in a network share, from running on schedule.

To remove a report from a schedule

- 1 On the Schedule tab, locate the desired scheduled report card.
- 2 Click **Remove**.
- 3 Click **Yes** to confirm.

Deleting a Schedule

If you no longer need a schedule, you can delete it. All scheduled reports are removed, and need to be run manually or added to another schedule.

If you are a reporting administrator, you can delete any schedule. For example, if an employee leaves, you can remove all of their schedules.

To delete a schedule

- 1 On the Schedule tab, locate the desired schedule card.
- 2 Click **Delete**.
- 3 Click **Yes** to confirm.

Running a Schedule

When you run a schedule, all reports on the schedule are immediately run with their current parameter values. Reports are delivered as defined in the schedule. You can also run a single report with the current parameter values.


To run all reports on a schedule

- 1 On the Schedule tab, locate the schedule card.
- 2 Click **Run All Reports**.

To run a single report on a schedule

- 1 On the Schedule tab, locate the schedule card.
- 2 Locate the report.
- 3 Click **Run Now**.

The report is delivered as outlined in the schedule.

 **MOBILE:** You can run your entire schedule or a single report on your mobile device using the Enterprise Reporter Mobile IT Pack.

Troubleshooting Scheduling Issues

If problems occur during the running of a schedule, an error indicator (a red dot) appears on the scheduled report card, along with an error message providing you with information to help you address the issue.

An error indicator on a schedule card indicates that one or more of the scheduled reports has an error. Resolve the issue, and then either wait until the next scheduled run, or manually run any needed reports by clicking Run Now on the scheduled report card, or run the schedule by clicking Run All on the schedule card.

Using the Credential Manager

Credentials are used in different places in Enterprise Reporter. For example, nodes and report schedules both use credentials. The Credential Manager is a central store for accounts and passwords used throughout the system. This makes it easy to keep passwords up to date, and allows you to enter the credential details once, and access them repeatedly.

- i **NOTE:** Credentials added in the Report Manager are only available to the user who added them, while accounts added in the Configuration Manager are available to all Configuration Manager users on the same Enterprise Reporter server.
- i **NOTE:** Credentials for Access Explorer are not stored in the Credential Manager. For more information on Access Explorer service accounts, see Server Service Credential Details in the Dell Enterprise Reporter Configuration Manager User Guide in the Technical Documentation.

Accounts are not verified when you add them, and they must already exist in order to be used by Enterprise Reporter. For each account, you can add a description. This is particularly useful for differentiating between similar accounts, such as similarly named service credentials, or your SQL Server® default "sa" accounts. The combination of the account name and the description must be unique.

To open the Credential Manager

- On the System | Configuration page, click **Manage credentials used by Enterprise Reporter**.
- OR -
- Click the ellipsis anywhere credentials are required.

To use a credential from the Credential Manager

- 1 Select the account from the list.
- 2 Click **OK**.

To add a credential for use in the system

- 1 Open the Credential Manager.
- 2 Click **+ Add**.
- 3 Type the account name.


You can enter any account that you want to use in Enterprise Reporter, including Windows® accounts and SQL Server® accounts.

If you are entering credentials in the Configuration Manager, remember that other users may have entered the same credential, so if necessary, verify that you are adding a unique account.


- 4 Type the password for the account.
- 5 Optionally, type a description.
The combination of the account name and the description must be unique.
- 6 Click **OK**.

To edit a credential

- 1 Open the Credential Manager.
- 2 Select an account.


- 3 Click  **Edit**.
- 4 Make any changes.
- 5 Click **OK**.

To delete a credential

- 1 Open the Credential Manager.
- 2 Select an account from the list.
You can only delete accounts that are not currently in use.
- 3 Click  **Delete**.
- 4 Click **OK**.

Changing Passwords Using the Credential Manager

When passwords are changed in Active Directory®, they need to be updated everywhere they are in use in Enterprise Reporter. It is possible that the account could be locked if you do not make this change. The Credential Manager makes this easy by providing a central store for accounts. You can change the password, and it is updated in all nodes, schedules, and so on.

 **NOTE:** You can modify credentials from anywhere you can access the Credential Manager. Be aware when you make a change to a credential, it is applied throughout your deployment, not just in your current context.

If you modify credentials that are used by a discovery node, the node service must be restarted before the changes take effect. Enterprise Reporter will attempt to restart the node; however, if the restart fails, you may need to manually start the service on the computer hosting the node. If there are jobs currently running on the node, they will be canceled. To prevent this, either change the credentials during a down time, or cancel the discoveries yourself and restart them once the change takes effect.

To change the password on an account used by Enterprise Reporter

- 1 On the System | Configuration page, click **Manage credentials used by Enterprise Reporter**.
It is recommended that you make these changes while no discoveries are running (or waiting to be run) before changing the password.
- 2 Select the account, and click **Edit**.
- 3 Modify the password and click **OK**.
A progress dialog box appears.
- 4 Verify that your changes were processed. If any errors occur, you will need to troubleshoot the issue and manually make any changes.

Changing Account Names Using the Credential Manager

In general, if you want to change an account name, it is recommended that you create a new credential, and delete the old one. However, in the case where you want to replace the credentials in use in a number of places in Enterprise Reporter, the Credential Manager enables you to make a single change and have it be applied across your deployment. For example, if you are provided a new service credential to replace a credential used for a dozen nodes in your environment, you can change the account name on the credential.

If you modify credentials that are used by a discovery node, the node service must be restarted before the changes take effect. Enterprise Reporter will attempt to restart the node; however, if the restart fails, you may

need to manually start the service on the computer hosting the node. If there are jobs currently running on the node, they will be canceled. To prevent this, either change the credentials during a down time, or cancel the discoveries yourself and restart them once the change takes effect.

To change the account used by Enterprise Reporter

- 1 On the System | Configuration page, click **Manage credentials used by Enterprise Reporter**.
It is recommended that you make these changes while no discoveries are running or waiting to be run before changing the account
- 2 Select the account, and click **Edit**.
- 3 Modify the account and click **OK**.
A progress dialog box appears.
- 4 Verify that your changes were processed. If any errors occur, you will need to troubleshoot the issue and manually make any changes.


Organizing Reports

My Reports can be organized by creating report categories, and if you are a reporting administrator, you can organize Published Reports. You can then copy reports between containers and categories, or move reports within containers.

Working with Report Categories

You can use categories to group reports together. You can also move and copy categories the same way you do reports.

To create a new category


- 1 Select the **My Reports** container.
You can also create subcategories by clicking on a category within My Reports.
- 2 Click **Create** and select **Category**.
- 3 Type a name and click **OK**.
 **NOTE:** To rename a category, right-click the category and select **Rename Category**.

To delete a category

- 1 Ensure the category does not contain any sub-categories or reports.
For information on deleting reports, see [Deleting Reports](#) on page 52.
- 2 Click **Delete**.

Moving Reports

You can move reports from one category to another within a container.

-  **NOTE:** You cannot move reports between containers; you must copy them. For example, if you would like a report from the Published Reports to appear in My Reports, you have to copy it. Dragging between containers automatically copies a report. For more information, see [Copying Reports](#) on page 52.


To move a report


- 1 If necessary, expand the container treeview so the destination category is visible.

- 2 In the treeview, select the report to move.
- 3 Drag the report into another category.

- OR -

Right-click the report and click **Cut**, then right-click the desired destination, and click **Paste**.

 **NOTE:** You can also move categories within a container by selecting a category in step 2. When you move a category, all reports in the category are also moved.

 **NOTE:** You cannot move reports to the Report Library from other containers.

Copying Reports


You can copy reports between containers or between categories. You can also copy a report if you want to create variations of the same report: copy the report, and then edit the settings as needed (see [Editing Reports](#) on page 54 for more information).

To copy a report

- 1 Expand the treeview and locate the report you want to copy.
- 2 Right-click the report and click **Copy**, then right-click the desired destination, and click **Paste**.

- OR -

Drag the report into another container.

 **NOTE:** You can also copy categories from one container to another, by selecting a category in step 1. When you copy a category, all reports in the category are also copied.

Deleting Reports

If you no longer need a report, you can delete it. Reports are permanently deleted, so make sure you no longer need the report before deleting it. When you delete a report, you also remove any scheduled instances of the report.

To delete a report

- 1 In the treeview, select the report and click **Delete**.

- OR -

On the Report card for the report, click **Delete**.


- 2 In the confirmation dialog box, click **Yes**.


Using My Reports

You choose what reports to include in My Reports. You can:

- Add existing reports for easier access by copying or importing.
- Create a new version of an existing report (for more information, see [Editing Reports](#) on page 54).
- Create a new report from scratch (for more information, see [Creating New Reports](#) on page 67).

Each installation of the Report Manager has its own unique My Reports container. You can create categories to organize your reports, and move and copy reports between categories.

 **TIP:** Give your reports unique names. When you click My Reports, you see a list of all reports from all categories. Reports with the same name will appear to be listed twice in the card view, and the only way you will be able to differentiate between them is to examine the properties of each report.


 **NOTE:** If you are a reporting administrator and want to make a customized report available to all users, you need to publish it. For more information, see [Using My Reports](#) on page 52.

Creating and Editing Reports

- [Editing Reports](#)
- [Creating New Reports](#)
- [Report Designer Tips and Tricks](#)
- [Publishing Reports](#)
- [Publishing Reports to Knowledge Portal](#)

Editing Reports

You can modify reports by changing the fields that are included in the report, adding or modifying the report parameters, or changing the layout and appearance of the report. You can only edit reports in the My Reports container.

 **VIDEO:** Watch the video: [Customizing an Existing Report](#)

You may be editing reports for different reasons, for example:


- You have created a new report and need to modify it.
- You are a reporting administrator getting ready to publish reports that are based on reports from the library, and they need tweaking to meet your needs.
- You have a published report to which someone has requested a change.


Using My Reports

My Reports is the only container in which you can edit or create reports, and only reports in My Reports can be scheduled. You choose what reports to include in My Reports. You can:

- Add existing reports for easier access by copying or importing.
- Copy reports to My Reports to edit them for publishing (for more information see [Copying Reports](#) on page 52).
- Create a new version of an existing report (for more information, see [Editing Reports](#) on page 54).
- Create a new report from scratch (for more information, see [Creating New Reports](#) on page 66).

Each installation of the Report Manager has its own unique My Reports container. You can create categories to organize your reports, and move and copy reports between categories.

 **TIP:** Give your reports unique names. When you click My Reports, you see a list of all reports from all categories. Reports with the same name will appear to be listed twice in the card view, and the only way you will be able to differentiate between them is to examine the properties of each report.

 **NOTE:** If you are a reporting administrator and want to make a customized report available to all users, you need to publish it. For more information, see [Publishing Reports](#) on page 74.

Modifying the Fields to be Included

You can add and remove fields from a report. Fields are organized by report type; a report can only contain fields from one report type. You cannot change the report type of a report. Each report type includes information from various related tables in the Reporter database. Some report types can be extended. By extending a report type, more fields are available to be added to your report. Typically, only a subset of the available fields are included in each report. You can add or remove fields to suit your needs.


NOTE: Each report has a layout, which determines the display of the fields, including the positioning, grouping and sorting. When you modify the included fields, the layout is not automatically updated. For information on modifying the layout, see [Changing the Layout](#) on page 64 and [Report Designer Tips and Tricks](#) on page 69.

Some functions can be implemented when choosing the fields, or when designing the report layout. For example, you can set sort ordering when you include the field in a report, or you can set it using the report layout. The difference between the two methods is where the action occurs. If you configure the fields, the action is carried out on the database before the report is generated. If you configure the report layout, the action is carried out as the report is generated. You may notice a performance increase if you configure the fields instead of the report layout.

By default, Enterprise Reporter collects a base set of attributes for each type of object. Your discovery administrator has the ability to extend some attributes in the Configuration Manager, and these are noted as (extended) after the field name in the Report Manager. They can be added to a report as usual, and you will find them in the report type associated with the object on which you are reporting. If you have requested that an attribute be collected, you need to restart your Report Manager in order to see the new fields in the report type.

You may also extend some report types to include additional fields for account objects. For example, in an NTFS report, you may want to see additional domain user fields that are collected by an Active Directory discovery. You can accomplish this by adding account objects to the report type. The available types of account objects you can add are:

- Domain User
- Domain Group
- Local User
- Local Group

When editing a report, in the Available Fields area, the option to extend the report type is indicated by this special folder icon  next to object names underlined in blue. You can right click the object names to see the available type of account objects that can be added. For detailed steps on extending the report type, see [To extend a report type](#) on page 56.

You can set the sort order for each field on this page as well. This sorts the fields in the database before reporting them. Sort order is important in determining what the report output looks like. The first sorted field is the primary sort, the second field is the secondary sort and so on. For example, if you sort ascending on Server Name, Instance Name, and Database Name then arrange the fields in that order, your results are returned like this:

Server A
Instance A
Database A
Database B
Database C
Instance B
Database A
Database B

Database C
Server B
Instance A
and so on.

To add and remove report fields

- 1 In My Reports, select the report, then click **Edit report**.
- 2 If necessary, rename the report to reflect your changes.
- 3 Click **Fields**.
- 4 In the Available Fields area, select any fields you want to add, and click **Add**.

You can multiselect fields using the Ctrl key.

The first time you modify fields in any editing session (add, remove, or right-click operations), a warning appears, explaining that the report layout is not automatically updated. For information on updating the layout to reflect your changes, see [Changing the Layout](#) on page 64 and [Report Designer Tips and Tricks](#) on page 69.

- 5 Click **OK** to continue.
You cannot change the report type.
- 6 In the Selected Fields area, select any fields that you want to remove and click **Remove**.

To set the sort order of fields

- 1 In Selected Fields, drag the fields as required.
You cannot move unsorted fields above sorted fields.
- 2 Right-click the field and select Sort Ascending or Sort Descending.
To remove sorting, choose No Sorting.

To extend a report type

- 1 In the Available Fields area, right-click any object underlined in blue.
- 2 To add fields to the report type, select the objects you want and click **OK**.
The new objects will appear in the Available Fields list.
- 3 Scroll down to see the new objects and expand them to see the additional fields.
- 4 Update the selected fields by clicking the **Add** and **Remove** options as usual. For more information, see [To add and remove report fields](#) on page 56.

Performing Calculations Within a Report

You can also apply an aggregate to certain fields. Aggregates provide summaries of the available rows and columns of collected data in the Reporter database. Depending on the type of field you are working with, the available aggregates are:

Table 21. Available Aggregates

Aggregate	Description
Average	Available for numeric fields, and averages all values in that field
Count	Counts each incidence of the selected field. For example, counting the version number would tell you the number of times each version number appeared.

Table 21. Available Aggregates

Aggregate	Description
Distinct Count	Counts each unique incidence of the selected field. For example, applying a distinct count to version number would tell you how many different versions you found.
Distinct Maximum	Returns the unique largest value for the selected field.
Min	Returns the smallest value for the selected field
Max	Returns the largest value for the selected field
Sum	Adds up the values in the selected field

To add an aggregate to a numeric field

- Right-click the field and select the aggregate

Indicating Data Age on a Report

Data in your reports may be drawn from different discoveries (for more information, see [Editing Reports](#) on page 54). This means that the freshness of your data may vary within a report. If it is important to understand when the data was collected, you can add this information to each top level object collected. The following table outlines where you can add this time stamp:


 **NOTE:** If you want to know the last time a value changed, you can add the Timestamp field.

Table 22. Where to add the Last Collected Time for each Report Type

Report Type	Last collected time available for...
Active Directory	Domain
Computer	Computer
Microsoft SQL Server	SQL Server
NTFS	Computer on which the folder, share, or file is located
Registry	Computer on which the registry is located

To add the last collected time to a report

- 1 Ensure you are working in the My Reports container.
- 2 Select the report, and click **Edit report**.
- 3 Click **Fields**.
- 4 If necessary, expand the appropriate container.
- 5 Add **Last Collected Time**.

Remember that you must add the field to the Layout if you want it to appear in your report. For more information, see [Changing the Layout](#) on page 64 and [Report Designer Tips and Tricks](#) on page 69.

Working with Report Parameters

When you collect data in Enterprise Reporter, all data from the target is collected. To create meaningful reports, this data must be filtered, sorted and organized for specific needs. Parameters are used to filter the data. When you add multiple parameters to a report definition, each parameter for which you provide values cumulatively filters the data—parameters are joined by AND, not OR.

What is a Parameter?

A parameter consists of the following:

Table 23. Parameter Elements

Element	Description
Prompt	<ul style="list-style-type: none">• Appears as the title of the parameter when running the report. You configure this prompt to explain to the report user what the intention of the parameter is. It should clearly convey the values the user needs to enter.• A prompt is required for Optional and Required parameters. For more information on parameter usage, see Types of Parameters on page 58.• The maximum size for a prompt is 128 characters.• Sample prompts: Choose the start and end date for the data in your report. Enter the names of all domains you want to include.
Field	<ul style="list-style-type: none">• The field that will be queried by the parameter.• Within a report, you can set as many parameters as you need to get the information you are looking for. You can create multiple parameters for the same field.• For more information on choosing the fields to include in your report, see Modifying the Fields to be Included on page 55.
Condition Operator	<ul style="list-style-type: none">• Sets the basis for the conditions that will be set to filter the available data.• The operators available vary depending on the field. For a list of operators, see Parameter Operators on page 59.• Examples of operators: Includes, Equals, Between.
Default Value	<ul style="list-style-type: none">• These values are presented when the report is run, and the user can choose to run the report using the default values, or to change the values to anything they want.• For Optional and Required parameter types, you can choose to create a default value, or list of values, depending on the operator.• Default values are required for Hidden parameters.• The form of these values is determined by the field and operator. For example, a date takes the form dd/mm/yyyy. Some operators allow you to create lists or ranges. You must enter values in the correct form before you can finish creating the parameter.

Types of Parameters

There are three types of parameters that you can create. By paying careful attention to choosing the proper parameter type, you can ensure that you get the right balance of user interaction and preset information, and that your report serves its intended purpose. Each type of parameter has to have specific elements in order to be accepted.


 **NOTE:** If you do not enter everything required for a particular type of parameter button, the OK button will be unavailable.

Table 24. Parameter Usage Requirements

Parameter usage	When creating the parameter	When using the parameter to run the report
Required	You must provide a prompt explaining the user input required when running the report. You can choose to supply a default value to the user, who can use that value or change it.	You cannot run the report unless this parameter is given a value.
Optional	You must provide a prompt explaining the user input required when running the report. You can choose to supply a default value to the user, who can use that value or change it.	You can run the report with or without a value.
Hidden	You must provide a default value. This value will be used when the report is run. You do not need to provide a prompt.	The user running the report does not see this parameter in the parameter card list.

Parameter Operators

The operators that are available for use depend on the data type of the field you are working with. The following table outlines the operators available.

Table 25. Parameter Operators

Operator	Description	Data types
Between	Returns all data between the two values you provide. For example, if you choose a field that contains text, and search between A and C, it will return all values that start with the letters A, B and C.	String Number Date
Contains	Returns all data containing the value you provide. The value can be found anywhere within the field. For example, if you enter AN, as long as that sequence of letters is found anywhere in the field, the data is returned. This is a very flexible operator. Many of the operations you can do with Contains can also be done using other operators. It is primarily intended for use with wildcard characters. Supported characters (for strings only): <ul style="list-style-type: none"> • *, which replaces any number of characters • ?, which replaces a single character. Returns all data that matches the combination of text and wildcard characters that you provide. For example: <ul style="list-style-type: none"> • Fin* returns all data that starts with Fin, and has any number of characters after it. (For this case, you could also use the Starts with operator) • Fin? returns anything that starts with Fin and has a single additional character. • *Finance returns any data that ends with Finance. (For this case, you could also use the Ends with operator) • *Finance* returns any data that has Finance anywhere in the field. (For this case, you could also use the Contains operator.) • F*e excludes any value that starts with F and ends with e. 	String

Table 25. Parameter Operators

Operator	Description	Data types
Does not Contain	Returns all data except those containing the value you provide. For example, if you enter AN, if that sequence of letters is found anywhere in the field, the data is not returned. You can use wildcard characters in the same manner as Contains.	String
Does not end with	Returns all data except that ending with the value that you provide.	String
Does not start with	Returns all data except that starting with the value that you provide.	String
Ends with	Returns all data that end with the value you provide.	String
Equals	Returns only the data that exactly matches the value you provide. Equals is not case sensitive.	String Number GUID Boolean Date
Equals with group expansion	Enter an Account Name. Results include the data for the selected account as well as the data for any group of which it is a direct or indirect member. For example, if an account is a member of Group A and Group A is a member of Group B, the results will include values/data for the account as well as Group A and Group B.	Account Name attribute only
Excludes	You provide a list of values. Returns all values except those matching your list. This acts as an OR when joining the list you provide—it returns data that does not match any one of the values. For example, if your Excludes list is Austin, Dallas and Houston, if a field includes any of the values, the data will not be returned. Supported wildcard characters (for strings only): <ul style="list-style-type: none"> • *, which replaces any number of characters • ?, which replaces a single character. For a full explanation of the use of these wildcard characters, see Contains on page 59.	String Number Date
Greater or equal to	Returns all data larger than and including the value you provide.	String Number Date
Greater than	Returns all data larger than the value you provide.	String Number Date
Has a value	Has two possible values: True or False. If you choose True, returns all data where the field is populated. If you choose False, returns all data where the field is empty.	String Number Boolean Date

Table 25. Parameter Operators

Operator	Description	Data types
In the next	<p>Enter a number of days. Returns data with a date range from the date and time you run the report to the number of days in the future that you enter.</p> <p>For example, if you run the report at 16:30 on December 12, and you enter six days, you will get data with the dates from December 12 at 16:30 to December 18 at 16:30.</p>	Date
In the past	<p>Enter a number of days. Returns data with a date range from the date and time you run the report to the number of days in the past that you enter.</p> <p>For example, if run the report at 16:30 on December 12, and you enter six days, you will only get data with a date from December 6 at 16:30 to December 12 at 16:30.</p>	Date
Includes	<p>You provide a list of values. Returns all values that match any item on your list. This acts as an OR when joining the list you provide—it returns data that does not match any one of the values.</p> <p>For example, if your Includes list is Austin, Dallas and Houston, if a field includes any of the values, the data is returned.</p> <p>Supported wildcard characters (for strings only):</p> <ul style="list-style-type: none"> • *, which replaces any number of characters • ?, which replaces a single character. <p>For a full explanation of the use of these wildcard characters, see Contains on page 59.</p>	String Number Date
Less than	Returns all data smaller than the value you provide.	String Number Date
Less than or equal to	Returns all data smaller than and including the value you provide.	String Number Date
Matches	You select two fields. Returns only the data where the contents of one field is identical to the other field. Matches is not case sensitive.	String GUID
Not between	<p>Returns all data that is not between the two values you provide.</p> <p>For example, if you choose a date field, and set the values to not between December 10, 2011 and January 15, 2012, you will get all corresponding data from December 10 and before, and January 15 and after.</p> <p>You must enter the lower value first, followed by the higher value.</p>	String Number Date
Not equals	Returns all data except for the value you provide.	String Number Date Boolean GUID

Table 25. Parameter Operators

Operator	Description	Data types
Not in the next	Enter a number of days. Returns all data except for the time period from the date and time you run the report to the number of days in the future that you enter. For example, if you run the report on December 12 at 16:30, and you enter six days, you will get all data except that with a date from December 12 at 16:30 to December 18 at 16:30.	Date
Not in the past	Enter a number of days. Returns data with any date except for the time period from the date and time you run the report to the number of days in the past that you enter. For example, if you run the report at 16:30 on December 12, and you enter six days, you will get all data except that with a date of December 6 at 16:30 to December 12 at 16:30.	Date
Starts with	Returns all data that starts with the value you provide.	String

Custom Query Data Types

The Enterprise Reporter Report Library contains many reports generated by custom queries. This table outlines the data types used in the Report Library custom queries and the operators supported for each of them. The equals operator returns only data that exactly matches a provided value, so wildcard parameters are not supported for custom query reports in the Report Library. When creating your own custom query reports, the query you write defines whether or not parameters with wildcard characters will be handled.

Table 26. Custom Query Data Types

Data Type	Description	Supported Operators
int	Holds signed 32-bit (4-byte) integers that range in value from -2,147,483,648 through 2,147,483,647. Use int to select the top 'n' records to limit the results of a report.	Equals
datetime	Defines a date that is combined with a time of day with fractional seconds that is based on a 24-hour clock. Use datetime to select records modified between two dates.	Equals
nvarchar [(n | max)]	The NVARCHAR data type is variable-length Unicode string data. n defines the string length and can be a value from 1 through 4,000. max indicates that the maximum storage size is 2 ³¹ -1 bytes (2 GB). The storage size, in bytes, is two times the actual length of data entered + 2 bytes.	Equals
table	A special data type that can be used to store a list of nvarchar. Use table to supply multiple values (such as a list of computer names) for a single parameter.	Includes
varchar [(n | max)]	The VARCHAR data type is variable-length string data. n defines the string length and can be a value from 1 through 4,000. max indicates that the maximum storage size is 2 ³¹ -1 bytes (2 GB).	Equals

Working with Parameters

To create a parameter

- 1 Select the report, then click **Edit report**.
- 2 Click **Parameters**.
- 3 Click **Create**.
- 4 In the Usage section, choose the parameter type.

- 5 If your parameter is a Hidden parameter, skip this step. In the Field section, in the Prompt text box, type a prompt.
Make sure your prompt provides the report user with enough information to properly run the report.
- 6 In the Field section, select the field for the parameter.
You can choose from any field included in the reporter. You can create more than one parameter per field.
- 7 In the Parameter Properties section, choose an operator.
- 8 If desired, select **Supply a default value**, and enter the value.
This step is necessary if you created a Hidden parameter in step 4.
- 9 Click **OK** to close the Edit Report Parameter dialog box.
- 10 Click **OK** to close the Edit Report Definition dialog box.

To edit a parameter

- 1 Select the report, then click **Edit report**.
- 2 Click **Parameters**, and select the parameter.
- 3 Click **Edit**.
- 4 Make changes as needed, and click **OK** to close the Edit Report Parameter dialog box.
- 5 Click **OK** to close the Edit Report Definition dialog box.

To delete a parameter

- 1 Select the report, then click **Edit report**.
- 2 Click **Parameters**, and select the parameter.
- 3 Click **Delete**.
- 4 Click **Yes** to confirm the deletion.
- 5 Click **OK** to close the Edit Report Definition dialog box.

Creating or Editing an Expand Nested Groups Parameter

Some reports support adding a parameter that allows you to expand nested group members and specify how they are displayed in the report. Some reports already contain this parameter which can be edited.

To create an Expand Nested Groups parameter

- 1 Select the report, then click **Edit report**.
- 2 Click **Fields**.
- 3 In the Available Fields area, select the Expand Nested Groups field, and click **Add**.
- 4 Click **Parameters**.
- 5 Click **Create**.
- 6 In the Usage section, choose the parameter type.
- 7 If your parameter is a Hidden parameter, skip this step. In the Field section, in the Prompt text box, type a prompt.
Make sure your prompt provides the report user with enough information to properly run the report.
- 8 In the Field section, select the field Expand Nested Groups.
- 9 In the Parameter Properties section, select the Equals operator.
- 10 If more fields for the nested group members are desired, select Supply a default value.


- 11 Optionally select a default value from the pull down menu.
- 12 Optionally click **Add Fields** to add more fields for nested group members. For more information on adding fields see [To add more nested group member fields when running a report](#) on page 37.
- 13 Click **OK** to close the Edit Report Parameter dialog box.
- 14 Click **OK** to close the Edit Report Definition dialog box.

To edit an Expand Nested Groups parameter

- 1 Select the report, then click **Edit report**.
- 2 Click the **Parameters** tab.
- 3 Select the Expand Nested Groups parameter.
- 4 Click **Edit**.
- 5 In the Usage section, choose the parameter type.
- 6 If your parameter is a Hidden parameter, skip this step. In the Field section, in the Prompt text box, type a prompt.
Make sure your prompt provides the report user with enough information to properly run the report.
- 7 In the Field section, select the field Expand Nested Groups. For more information on selecting available fields, see [Modifying the Fields to be Included](#) on page 55
- 8 In the Parameter Properties section, select the Equals operator.
- 9 If more fields for the nested group members are desired, select Supply a default value.
- 10 Optionally select a default value from the pull down menu.
- 11 Optionally click **Add Fields** to add more fields for nested group members. For more information on adding fields, see [To add more nested group member fields when running a report](#) on page 37.
- 12 Click **OK** to close the Edit Report Parameter dialog box.
- 13 Click **OK** to close the Edit Report Definition dialog box.

Changing the Layout

If you add or remove fields from your report, you need to verify that your layout is still appropriate. You may also want to modify an existing layout to suit your own preferences.

 **TIP:** You should always back up your report by making a copy before modifying the layout. You cannot undo changes to a layout once you have clicked OK in the Edit Report dialog box.

If you have date and time fields in the report, you might want to add your local time zone to the report layout. When date and time data is collected, it is stored in UTC. When a report is run, the time is expressed in the time zone of the console running the report. For example, if a user in New York City logged on at 4:15 pm, but the report was run in Los Angeles, which is three hours behind, the report will show that user logging in at 1:15 pm.

The Layout is modified using the Report Designer from DevExpress. For more information, see [Report Designer Tips and Tricks](#) on page 69 or the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

To modify the layout of a report

- 1 Click **My Reports**.
- OR -
Expand **My Reports** and select the category containing the report. In the treeview, select the report you wish to edit.

If you are a reporting administrator, you can also edit reports in Published Reports. However, it is recommended that you copy the report to My Reports to for editing.

- 2 On the report card for the report, click **Edit**.
- 3 Select the **Layout** tab.
- 4 Click **Edit this layout in the layout designer**.

If you would rather start from a blank layout, and create your new layout, click "Design a new layout using the layout designer".

- 5 To add any parameter (such as the time zone) to your report, in the Report Designer, click the Field List, expand the parameters node, and drag the parameter (for example, TimeZone) to the appropriate location on the report.
- 6 Make any changes to the layout.

For details on using the features of the Report Designer, see [Report Designer Tips and Tricks](#) on page 69 or the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

- 7 Click **OK**.

To use the Report Wizard to generate a new layout for the report

- 1 Click **My Reports**.

- OR -

Expand **My Reports** and select the category containing the report. In the treeview, select the report you wish to edit.

If you are a reporting administrator, you can also edit reports in Published Reports. However, it is recommended that you copy the report to My Reports to for editing.


- 2 On the report card for the report, click **Edit**.
- 3 Select the **Layout** tab.
- 4 Click **Auto-generate a layout**.
- 5 Step through the wizard.

For more information, refer to the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

- 6 Once you have completed the wizard, click **OK** to close the Report Definition dialog box.

Report Modification Example

The following example walks you through all of the steps necessary to modify a report.

 | **VIDEO:** Watch the video: [Customizing an Existing Report](#)

Example: You want to modify the SQL Database report to only display databases from SQL servers[®] running Microsoft[®] SQL Server[®] 2008. The report in the library does not include the version in it, so you will need to add that field to the report. You are going to change the title to reflect this, so you do not need to include the version for each database. This means you will use a hidden parameter for the version, and filter the data to show only the version you choose.

To modify your SQL Database report

- 1 Copy the SQL Databases report from the Report Library to My Reports.
- 2 In the My Reports treeview, select the report.
- 3 Click **Edit Report**.

- 4 Change the title of the report to **SQL Server® 2008 Databases**.
- 5 Click the **Fields** tab, and add the Version field to the report.
Click OK in the warning dialog box. Because we do not want this field to show on the report, no layout modification is necessary. If you want to display the new field, you must add the field to the layout. For more information, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.
- 6 Click the **Parameters** tab and click **Create**.
- 7 Set the Usage to **Hidden**.
- 8 In the Select the field to associated with this parameter list, click **Version**.
- 9 In the Parameter Properties area, set the condition operator to **Equals**.
- 10 Select the SQL version you want (for example, SQL Server® 2008 is version 10.0).
- 11 Click **OK**.
- 12 Click **OK** in the Edit Report Definition dialog box.



Creating New Reports

If you are unable to get the information you want by modifying an existing report, you can create a new report from scratch. In cases when you cannot get the information you want by creating reports from existing fields and operators, or when you need to transform the data, you can use a custom query report.

To create a new report

- 1 Select My Reports or a container within My Reports.
If you intend to publish this report, you should still create it in My Reports, and ensure it works as anticipated before publishing the report. For more information, see [Editing Reports](#) on page 54.
- 2 Click **Create | Report**.
- 3 On the General page, enter a report name, author and description.
These are searchable fields, so provide consistent information in your reports to make them easy to find.
- 4 On the Fields page, select the report type on which to base your new report.
You can only select fields from one report type.
For an overview of report types, see [Report Types Included in Enterprise Reporter](#) on page 26.
- 5 Select the fields, and click **Add**.
- 6 To sort on a field or apply an aggregate, right-click the field and choose the option from the menu. For more information, see [Modifying the Fields to be Included](#) on page 55.
- 7 On the Parameters page, create the required parameters. For more information, see [Working with Report Parameters](#) on page 57.
- 8 On the Layout page, create your report layout.
For more information, see [Creating Report Layouts](#) on page 67, [Changing the Layout](#) on page 64 and [Report Designer Tips and Tricks](#) on page 69. For a full explanation of report layouts, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.
The Query page shows you the query that will be used to generate your report.
- 9 Click **OK**.
The report appears in the location you selected in step 1.

To create a custom query report

- 1 Select My Reports or a container within My Reports.
If you intend to publish this report, you should still create it in My Reports, and ensure it works as anticipated before publishing the report. For more information, see [Editing Reports](#) on page 54.
- 2 Click **Create | Custom Query Report**.
- 3 On the General page, enter a report name, author and description.
These are searchable fields, so provide consistent information in your reports to make them easy to find.
- 4 On the Query page, type or paste your query.
You can use any query writing tool to generate the query, and then copy it.
 **NOTE:** The query you write defines whether or not parameters with wildcard characters will be handled.
- 5 Click **Validate Query**, then click **OK**.
- OR -
If necessary, resolve any issues and validate your query again.
- 6 Optionally, on the Parameters page, create the required parameters. For more information, see [Working with Report Parameters](#) on page 57.
If your custom query contains at least one declare parameter (such as Declare @p nvarchar(128)), the Parameters page will be available.
 **NOTE:** Wildcard character support will only be available if the query was written to handle it.
- 7 On the Layout page, create your report layout.
For more information, see [Creating Report Layouts](#) on page 67 and [Changing the Layout](#) on page 64 and [Report Designer Tips and Tricks](#) on page 69. For a full explanation of report layouts, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.
- 8 Click **OK**.
The report appears in the location you selected in step 1.

Creating Report Layouts

There are two ways to create a new layout for a report. You can start from scratch, and manually place fields and text labels, set sorting and grouping and so on. Or, layouts can be auto-generated using the Report Wizard. By stepping through the six steps in the wizard, you can easily generate a layout that includes the relevant fields in a useful manner:

- Step 1 - Choose Columns to Display in Your Report
- Step 2 - Add Grouping Levels
- Step 3 - Summary Options
- Step 4 - Choose Report Layout
- Step 5 - Choose Report Style
- Step 6 - Enter a Report Title

For a full explanation of the creating new layouts, refer to [Report Designer Tips and Tricks](#) on page 69 and the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

To create a new report layout using the Wizard

- 1 In the Edit Report Definition dialog box for the report, click the **Layout** tab.

For more information, see [Editing Reports](#) on page 54.

- 2 Click **Auto-generate a layout**.
- 3 Step through the wizard.

For more information, see [Report Designer Tips and Tricks](#) on page 69 and the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

- 4 Once you have completed the wizard, click **OK** to close the Report Definition dialog box.

To create a new report layout from scratch

- 1 In the Edit Report Definition dialog box for the report, click the **Layout** tab.

For more information, see [Editing Reports](#) on page 54.

- 2 Click **Design a new layout using the layout designer**.

For details on using the features of the Report designer, see [Report Designer Tips and Tricks](#) on page 69 and the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

- 3 Click **OK**.

Exporting and Importing Report Definitions

There are two ways to move reports between consoles: you can publish a report, which makes it available to all users of the server, or you can export a report definition, and then import it to a specific console. You can export a single report or an entire category. When you export a report, all report settings are stored, including the report name, fields, parameter settings, filters, report layout and any queries. The report definition is saved in your chosen folder, with the extension `.xrd`. To import the report definition, either to another category in your console, or to another console, make the `.xrd` file available.

NOTE: Report names can contain characters, such as `\` or `%`, that cannot be used in filenames. In this case, when the exported file is saved, Reporter replaces those characters with underscores.

To export report definitions

- 1 Select the reports or categories to export.
- 2 Click **Export**.
- 3 In the Browse for Folder dialog box, navigate to the appropriate folder and click **OK**.

If a report with the same name already exists in the selected folder, a confirmation dialog box appears. Select **Yes** or **Yes to All** to replace duplicates.

- 4 Click **OK**.

To import report definitions

- 1 Select the destination container or category.
- 2 Click **Import**.
- 3 In the Open dialog box, navigate to the folder containing the report definition files (`.xrd`).
- 4 Select the reports, and click **Open**.

If a report with the same name already exists in the selected container or category, a confirmation dialog box appears. Choose **Replace** or **Replace All** to replace the report, or choose **Create a new copy** and the imported report will be renamed by adding an incremental number in brackets after the report name.

Report Designer Tips and Tricks

The Report Manager provides access to the Report Designer, which allows you to modify an existing report layout or to create a new report layout. The following section provides some simple tips and tricks for using the Report Designer Tool.

For detailed information on accessing the layout designer tool, see [Changing the Layout](#) on page 64 and the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

The Report Designer Tool contains the following elements, which will be referred to in the following sections:

- Designer window
- Preview window
- Script window
- Toolbox
- Report Explorer tab
- Fields List tab
- Property Grid panel

Report Bands

When the layout designer is first opened, you are provided with a standard report layout template. A report layout contains report bands. Bands are report sections that can be printed once in a report (report header and footer), on each report page (page header and footer), for each data entry (detail band), for each data group (group header and footer).

The Detail Band is the central part of a report. Unlike other report bands, you cannot delete this band. The contents of the Detail band are repeated for every data entry produced by the report query.

The template provided in the Report Manager contains the following bands:

- Report Header (one band per report)
- Page Header (one band per page)
- Main Group Header
- Group Header 2
- Group Header 1
- Detail Header
- Detail Band
- Group Footer 1
- Page Footer (one band per page)

Controls can be added to each band. Some of the standard types of controls available are as follows:

- Label
- Check box
- Rich Text
- Picture Box
- Panel
- Table
- Line
- Shape

- Chart

Each control has multiple properties that can be updated using the Property Grid. Properties related to appearance, behavior, layout, and data can be set and edited. For full information on each property, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

Binding a Data Field to a Control

When modifying or creating a report, you may need to display the contents of a database field at a specific location within the report. To control how, where and when the database field is displayed, you must use the Report Designer Tool to select an appropriate type of control then bind the data field to that control.

For this example, we will edit an existing report and bind a field to a rich text control. The same process can be used for most controls - labels, rich text, table cells, and so on.

For more information on data binding, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

To bind a data field to a control

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.
For more information, see [Changing the Layout](#) on page 64.
- 3 From the Toolbox, drag the Rich Text control to the location where the database field is to be displayed on the report.
Rulers and grid lines are available to help you align the control with other controls on the report.
- 4 Click the control in the report and use the options in the Property Grid to adjust properties such as font, size and color.
- 5 With the control still selected on the report, click the **Fields List** tab and expand the Table folder under dataSet1.

Every database field that has been added to your report on the Fields tab will be displayed. For more information on adding fields to your report see [Modifying the Fields to be Included](#) on page 55.

Click the database field to be bound to the rich text control and drag it on top of the rich text control on the report.

- OR -

With the control still selected on the report, navigate to the Data section of the Property Grid. Expand **Data Bindings | Rtf** and click the **Binding** drop-down arrow and select the field to be bound to this control.

Adding a Parameter Field to a Report Layout

Each parameter of a report is included in the Field List and can be added to the layout of that report.

To add a parameter field to your report

- 1 In the Report Designer, click the **Field List**.
- 2 Expand the **Parameters** node.
- 3 Drag the parameter (for example, TimeZone) to the appropriate location on the report.

Adding a New Grouping to a Report Layout

Groupings are set in a report layout using group bands. Each group band needs to be configured with applicable settings to group the information in your report in a meaningful manner.

To add a new grouping to a report layout

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.
For more information, see [Changing the Layout](#) on page 64.
- 3 In the Designer pane, right-click the location on the report where you want to insert a grouping header.
- 4 Click **Insert Band** and click **Group Header** to create a group header band.
- 5 Click the group header band and click on the > icon to open the Group Header Tasks dialog box.
- 6 Click *** next to Group Fields to display the Group Field Collection Editor.
- 7 Click **Add** to add a new group field to the collection.
In the Group Field properties panel, click the **Field Name** drop-down arrow and select the data field for grouping.
Repeat this step for each level of grouping required.
- 8 Click **OK** to save the grouping collection.
- 9 Optionally configure group header settings such as **Keep Together** and **Repeat Every Page** to control how the groupings are displayed in the report.

Adding a New Column to a Table

When creating or modifying a report, there are many instances where you will want to edit a table. The default report template has tables created in each band.

To add new cells to a table

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.
For more information, see [Changing the Layout](#) on page 64.
- 3 Click the band that contains the table control to be edited.
- 4 Click the table.
- 5 Right click and select **Insert | Column To Right**.
- OR -
Right click and select **Insert | Column to Left**.
- 6 Click the new column.
- 7 In the Property Grid, set the applicable properties.
- 8 To bind the new column to a data field, select the data field from the Fields List tab and drag it on top of the column.
For more information, see [Binding a Data Field to a Control](#) on page 70.

Formatting Rules: Hiding or Showing a Field Based on Data Values

This advanced option is used when you want to control the display of data based on the value of the data. For example, if the value of the data to be displayed in a field is null, you may wish to suppress it. There are many other formatting rules that can be applied based on the value contained in the data. For more information, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

In this section, we are going to illustrate formatting rules using an example of hiding/showing a table cell control based on a data value.

To hide or show a field based on data values

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.
For more information, see [Changing the Layout](#) on page 64.
- 3 Click the table cell in the report that is to be shown or hidden based on the value of the data it contains.
- 4 On the Property Grid, scroll to the Appearance section and click the **Formatting Rules** property.
- 5 Click **...** to open the Formatting Rules Editor.
- 6 Click **Edit Rule Sheet** to create a new rule.
- 7 Click **+** to add a new formatting rule.
- 8 In the Behavior section, click the **Condition** field.
- 9 Click **...** next to the Condition field and set a conditional expression for the rule.
There are multiple expressions that can be created. For setting a condition on a data value, select the data field from the list, select operator and value to be compared.
Example: [Domain Name (Domain)] == 'ABC'
- 10 Click **OK** to save the condition.
- 11 To show the table cell based on the condition, set the **Formatting | Visible** behavior to **Yes**.
- OR -
To hide the table cell based on the condition, set the **Formatting | Visible** behavior to **No**.
- 12 Click **Close**.
- 13 To apply this formatting rule to the table cell, click the rule and click the **>** icon to add the rule to the list for "Rules Applied to This Control".
- 14 Click **OK**.

Creating a Calculated Field

Calculated fields are data fields that can be created to perform calculations over different data fields in your report.

To create a calculated field

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.

For more information, see [Changing the Layout](#) on page 64.

- 3 Click the **Fields List** tab.
- 4 To add a new calculated field to the field list, in DataSet1, right-click the **Table** folder and click **Add Calculated Field**.

The new calculated field is created under the Table folder.

- 5 To open the Collection Editor, right-click the new calculated field, and click **Edit Calculated Field**.
- 6 Enter a name in the (Name) property.
- 7 In the calculated field properties, select the appropriate field type.

Possible field types include String, DateTime, TimeSpan, Byte, Int16, Int32, Float, Double, Decimal and Boolean.

- 8 To open the Expression Editor, click **Expression property** and click *******.
- 9 Set the applicable expression and click **OK**.

The calculated field value is based on the results of the expression. The expression can be created using functions, operators, data fields, constants and parameters. For example, to create a full name field from two fields (First and Last Name) use “”.

For more information, see the Report Designer User Guide (Developer Express), located in the folder where you installed the Report Manager.

- 10 Click **OK** to save the calculated field.
- 11 Drag and bind the calculated field to any control for display in report layout.

For more information, see [Binding a Data Field to a Control](#) on page 70.

Creating a Script to Run with a Report

Scripting allows you to insert scripts into a report and execute them when the report is previewed, printed or exported. Script commands should be placed within the event handlers of the report objects. When the corresponding event occurs (for example, a mouse click), the script code runs.

Script languages supported include C#, Visual Basic® and J#.

To add a script to an event

- 1 In My Reports, select the report, then click **Edit report**.
- 2 To edit the existing layout, click the **Layout** button, then click the **Edit this layout in the layout designer** button.
- 3 Select the report control or object to execute the script on an event.
- 4 On the Property Grid in the Behavior section, expand the **Scripts** property and click the event on which to run the script.
- 5 To create a script for the selected event, click the drop-down arrow and select **New**.
- 6 In the Script Editor, enter the text for the new script.

Use the Validate option to validate and view script errors in the bottom panel.

- 7 Click **OK** to save changes and exit the script editor.

- OR -

Click the **Designer** tab to return to the Report Designer to continue editing the report.

You can edit and view the script by selecting the Scripts tab on the main Report Designer page.

Publishing Reports

Reporting administrators can publish reports that will be useful to their users. When a report is added to the Published Reports container, it is visible to all reporting users the next time they open their console. These reports are generally customized to suit your environment. You can base a published report on a report from the library, or you can create a new report and publish it. To prevent users from accidentally running an unfinished report, you cannot create or edit reports directly in Published Reports.

If you have many published reports, you can create categories to group your reports for easier access. For information on copying reports, see [Copying Reports](#) on page 52. For information on categories, see [Working with Report Categories](#) on page 51.

To publish a report

- Copy a report from My Reports or the Report Library into Published Reports.

To update a published report

- 1 Copy the report from Published Reports into My Reports.
- 2 Modify the report as needed.
- 3 When you are ready to publish, delete the old version from Published Reports.

If you skip this step, when you copy the revision back to Published Reports, it will be renamed to Report Name (1).

- 4 Copy the report from My Reports to Published Reports.


Publishing Reports to Knowledge Portal

Knowledge Portal is a cross product online reporting platform. Once Knowledge Portal is deployed, you can configure Enterprise Reporter for publishing. Reports can then be published, allowing users to generate reports using a web browser instead of the Report Manager.

Configuring Knowledge Portal

In order to configure the Report Manager so that you can publish reports, you must provide:

- The reporting services URL that hosts Knowledge Portal as configured in SSRS. This must be entered in the form `http://servername/ReportServer/` or `http://servername/Reports`.
- A user account for accessing the reporting services URL. The account must have access to the URL.
- A shared data source, to be used by all reporting administrators. If the data source doesn't exist, it is created. You can use an existing data source by entering its name. The data source is automatically linked to your Enterprise Reporter database. You need to provide an account that is able to access the Enterprise Reporter database and has been given appropriate rights to read collected data from the database. The account needs to be in the Reporter_Reporting_Admins or Reporter_Reporting_Operator groups.

 **NOTE:** Only reporting administrators can configure and publish to Knowledge Portal.

 **NOTE:** For information on configuring Knowledge Portal, see the product documentation included on your CD or download package.

To configure Knowledge Portal for publishing reports


- 1 On the System Configuration page, click **Configure Knowledge Portal used by Enterprise Reporter**.


- 2 Enter the reporting services URL.
- 3 Open the Credential Manager and select or add an account.
For more information, see [Using the Credential Manager](#) on page 49.
- 4 Test your connection.
- 5 Enter a name for your shared data source.
If you have previously created a shared data source that you want to use, enter the same name. If you are setting up a new data source, it will be created using the provided name the first time a report is published.
- 6 Choose the type of authentication.
- 7 Open the Credential Manager and select or add an account that can access the Enterprise Reporter database.
- 8 Click OK.

Publishing Reports to Knowledge Portal

Reporting administrators can publish any report to Knowledge Portal. Once published, users with access can generate these reports from a web browser.

You can publish an entire container at once. All reports in the container will appear in a flat list, even if they were originally in a subcontainer in Enterprise Reporter.

 **TIP:** Before publishing a report, verify that a report with the same name has not already been published. Reports with the same name will be overwritten automatically.

 **CAUTION:** You should verify any reports that have been published with errors. Use the Open Log option to examine details in the log and determine what issues to resolve. Some features, such as scripts, which are possible in Enterprise Reporter, are not supported by Knowledge Portal. When you run a report in Knowledge Portal with filters, data types, fields or controls that are not supported, the field will appear as undefined. You can modify the report to resolve the errors in Enterprise Reporter (see [Editing Reports](#) on page 54) and then republish it. For example, you could change an operator.

To publish reports to Knowledge Portal


- 1 On the Report tab, right click any report or container.
You can select multiple reports.
You cannot publish the default containers: My Reports, Published Reports or Report Library.
- 2 Click **Publish to Knowledge Portal**.
- 3 If you are only publishing a single report, you can modify the name.
- 4 If you want to create or publish to a folder, type the path structure.
The full URL to the published report is shown.
- 5 Click OK.
- 6 A dialog box displays each step of progress during publishing.
Any errors encountered during publishing are also displayed.
- 7 If your report published successfully, click **Close**.
You can now run this report from Knowledge Portal. See the [Knowledge Portal User Guide](#) or your Knowledge Portal administrator for details.
- OR -
If your report had errors, click **Open Log** and examine the details in the log to determine what issues to resolve, then click **Close**.

Exploring Access

- [Explore](#)
- [Exploring Access Data](#)
- [Configuring Access Explorer](#)
- [Managing Accounts](#)
- [Exploring Accounts](#)
- [Sorting and Filtering Columns](#)
- [Filtering the Resource List](#)
- [Viewing Group Membership](#)
- [Viewing Permissions](#)
- [Reporting on Permissions](#)
- [Reporting on Permissions](#)


Explore

To ensure network resources such as files, folders and shares are secured in a manner that meets your business needs you must be able to easily identify who has been given access to those resources and manage that access appropriately. Using the Explore tab, you can quickly see who has access to specific resources (files, folders, and shares) and the permissions associated with those resources. At any point in the exploration of an account, you can run reports on the information.

-  **NOTE:** You must be a member of the Reporter_Exploring_Operators group to see the Explore tab. If the tab is missing from your system, contact your Enterprise Reporter administrator.

Exploring Access Data

Access Explorer scans managed computers on managed domains and collects security access information on files, folders, and shares. The data is stored in the Access Explorer database.

-  **NOTE:** Managed domains and computers are configured in the Configuration Manager. If the domain or computer you need to monitor is not available in the Report Manager, contact your Enterprise Reporter administrator.

When you drill-down on an account, the data is pulled from the Access Explorer database so you can quickly drill-down from accounts to computers to permissioned accounts to resources. At the resource level, the explicit permissions are displayed. You can choose to view the full access control list (ACL) for selected resources, but be aware that the process may take some time. For more information, see [Viewing Permissions](#) on page 82.

To reload data from the Access Explorer database

- Click **Refresh**.

NOTE: The Access Explorer cache is refreshed every 24 hours by default. The setting is configurable on the System Configuration tab. For more information, see [Setting Automatic Cache Refresh](#) on page 78.

NOTE: If you do not see any data, check that the Dell Enterprise Reporter Access Explorer is installed and configured and that you have the appropriate permissions. Contact your Enterprise Reporter administrator.

Configuring Access Explorer

There are two settings that affect the performance of Access Explorer. You can set the length of time in hours for Access Explorer data to reside in the cache. You also can set the maximum number of records to display before a warning message displays.

Setting Automatic Cache Refresh

When you drill-down on an account, the data is pulled from the Access Explorer database and stored in a local cache so you can quickly drill-down on accounts. By default, data resides in the cache for 24 hours before it is refreshed automatically. You can increase or decrease the length of time before automatic refresh.

To set the automatic data cache refresh

- 1 On the System Configuration page, click **Configure Access Explorer**.
- 2 Type a value in hours for the duration of data in the cache.

By default the cache automatically refreshes every 24 hours. To remove the automatic refresh, clear the check box. You can refresh the data manually at any time by clicking **Refresh**. For more information, see [Filtering the Resource List](#) on page 81.

Setting Maximum Record Display

When you drill down on an account, you can set the maximum number of records to display before a warning message displays. By default, a warning message displays when the number of records exceeds 50,000. The warning message provides an opportunity to apply a filter to reduce the number of records.


To set the maximum rows of records to display

- 1 On the System Configuration page, click **Configure Access Explorer**.
- 2 Type a value in number of rows for the maximum amount of records to display.

By default, a maximum of 50,000 records are displayed. If the number of records exceeds the maximum value, a warning message displays. For example, if the value is 10,000 and Access Explorer returns 25,000 records, only the first 10,000 records will display if you choose to continue. To remove the warning message, clear the check box. You can filter the records manually. For more information, see [Filtering the Resource List](#) on page 81.

Managing Accounts

The Accounts tab displays the accounts and groups, both domain and local, that were added for exploring. You can add and remove accounts and groups as needed. Once an account is added to the list, you can select that account to open in a separate tab to view the resources for that account.

 **TIP:** The more accounts you add, the more time is needed to extract data from the database. Only add those accounts whose permissions you want to explore.

Adding Accounts

The first time you open the **Explore** tab, the Accounts tab is empty. You can add both domain and local accounts.

To add a domain account

- 1 On the Accounts tab, click **Add Accounts**, and then select **Domain Account**.
- OR -
Right-click in a blank area and select **Add Domain Account**.
- 2 Locate the account using the **Select User or Group** dialog box.
- 3 Click **OK**.

To add a local account

- 1 On the Accounts tab, click **Add Accounts**, and then select **Local Account**.
- OR -
Right-click in a blank area and select **Add Local Account**.
- 2 Type the name of the computer or browse to select a computer.
- 3 Select a local account or group from the list.
- 4 Click **Add**.

Removing Accounts

Removing an account removes it from the list of accounts on the Explore tab only. You can use the Shift and Ctrl keys to select multiple accounts for removal.

To remove an account

- 1 On the Accounts tab, right-click one or more accounts and select **Remove Account**.
- 2 Click **Yes**.

Exploring Accounts

Access Explorer allows you to explore access information for accounts you add to the Accounts tab. When you drill-down on an account, a new tab opens showing each computer on which the account has explicit permissions to some resources. From the list of computers, you can drill-down to see in which groups (permissioned accounts) the account is a member and is given explicit permissions to resources through. From

the list of permissioned accounts, you can drill-down to see the resources (files, folders, and shares) on which the account has explicit permissions.

- ① **NOTE:** If there is more than one permissioned account, you can choose All Accounts to run reports or view resources on all of the accounts listed.

You can choose to drill-down on a single tab by double-clicking an item or you can choose to view the information on separate tabs, which preserves the information as you drill-down. Choose whichever method works best for you.



To drill-down on an account or computer

- Double-click an account or computer.
- OR -
- Right-click an account/computer and select **View in New Tab**.


When you drill-down on an account, you may see a warning. Before the list of resources and permissions display, Access Explorer performs a pre-check based on the System Configuration | Access Explorer Settings | Maximum Record Setting value. For more information, see [Setting Maximum Record Display](#) on page 78. If that value is not defined, the warning displays if the number of files or folders exceeds 50,000. You can choose to continue, cancel, or apply a filter to reduce the number of files/folders that display. For more information, see [Filtering the Resource List](#) on page 81.

Sorting and Filtering Columns


To sort a column

- Click  to sort in descending alphabetical order (Z to A).
- Click  to sort in ascending alphabetical order (A to Z).

To filter a column

- 1 Click  in a column heading. A list of every entry in that column displays.
- 2 Choose a value to filter on.
 - (Blanks) displays rows with a blank entry in that column.
 - (Non-blanks) displays rows with an entry.
 - (Custom) opens a Custom AutoFilter where you can create a custom filter.

To clear a filter

- Click  in a column heading and choose **(All)**.
 - ① **NOTE:** If you click in a column heading and do not see the icons, that column cannot be sorted or filtered. Because of the amount of data returned in the Resource view, the method for filtering the columns is unique. For more information, see [Filtering the Resource List](#) on page 81.
 - ① **NOTE:** Filters are retained as you drill-down until you clear the filter. If you apply a filter at the computer level, that filter remains applied at the permissioned accounts and resource levels. For example, if you drill-down on Account A and apply a filter at the Resource level, that same filter is applied if you drill-down on Account B.

Filtering the Resource List

Drilling down on an account can produce a large amount of data. Applying a filter makes the list of resources more manageable.

In addition to the sorting options available for columns (see [Sorting and Filtering Columns](#) on page 80), you can filter the resource list by typing in the blank row at the top of each column, except for the Type column.

To filter the Type column


- Click in the blank row under the Type column heading and select the type of resource to display.

To filter the Name, Location, and Permissioned Through columns

- Click in the blank row under the column heading, and begin to type the value on which you want to base the filter.

To view the filter that is applied



- Hover the cursor over the Filters button.

 **NOTE:** Access Explorer retains five of the previous filters you apply. Click **Filters**, point to Previous Filters and choose from the past five filters.

Creating a Custom Filter

If you drill down on an account, you may receive a warning that a large amount of data will display. You can choose to create a custom filter by clicking **Yes** in the information box, or you can use the Filters button.

To create a custom filter

- 1 Click **Filters** and choose **Create Filter**.
- 2 In the Filter Editor, click **[Name]** to select the information on which to filter. You can choose Name, Path, Permissioned Through Account, or Type.
- 3 Click **Equals** to select an operator from a list of available operators.
- 4 Click **<enter a value>** and type the value on which to filter.
 - If you choose Type, select a variable from the list.
- 5 To add another condition, click . To remove a condition, click .
- 6 Click **OK**.

To view the applied filter, hover the cursor over the Filters button.

Editing a Custom Filter


To edit a custom filter

- Click **Filters** and choose **Edit Filter**. See [Creating a Custom Filter](#) on page 81.

Clearing a Filter

There are two methods for clearing a filter depending on how the filter was created or applied.

To clear a filter applied by typing in the blank row

- Click  in a column heading and choose (All).

To clear a custom filter

- Click **Filters** then choose **Clear Filter**.

Viewing Group Membership


Only accounts with explicit permissions are listed in Explore. You can view all groups and nested groups of which the selected account is a member.

To view all groups and nested groups

- 1 Right-click an account and select **Show Member Of**.
If there are any issues contacting other domains, select the **Click to see a list of issues** option to display a window with a description of the issue associated with the data retrieval.
- 2 Click **Close**.

Viewing Permissions

When you select a file or folder, the explicit permissions that exist for that object are displayed. You also can view full permissions on the actual file/folder/share object by selecting the **Show Full Permissions** check box. When full permissions are displayed, the owner is displayed as well.


 **NOTE:** Depending on the amount of information and other environmental factors, loading full permissions may take some time.

To view explicit permissions

- Select a file or folder.

To view full permissions

- Select **Show Full Permissions** to initiate a refresh of the Permissions list to include full permissions. Full permissions include both explicit and inherited permissions. The owner is displayed as well.

 **NOTE:** If full permissions cannot be obtained, the explicit permissions are displayed and the **Show Full Permissions** check box is cleared.

To sort the information

- Click the column header to sort on that field.
To sort in the opposite order, click the column header again.

Reporting on Permissions

You can generate a permissions report for a specific computer or for all computers for which the user account has access. The report shows the permission granted to the user account, either explicitly only or explicitly and through group(s) membership.

The report gives the permission for the following resource types: folders, files, and shares. You select the resource type when you create the report. The more resource types that are selected the report will contain much more information and make for a large report that may be difficult to manage as a report.

You can export the report to a CSV file for further processing or display the report on the screen for review. The on-screen report is formatted as a document and can be saved as a PDF or other formats.

- TIP:** At the Accounts level, any report you run on an account causes the Explore service to pull in data from every managed computer on which that account has explicit permissions. The report generation could take a large amount of resources and time to complete. Drilling down to another level to run a report reduces the amount of data pulled by the Explore service.

If the report you choose returns a large amount of data, you see a warning message advising you to drill-down to a lower level or specific computer. You can choose to continue with the report or cancel.
- NOTE:** If there is more than one permissioned account, you can choose All Accounts to run reports on all of the accounts listed.

Table 27. Access Explorer Permission Reports

Report Name	Description
Explicit Permissions (run at the Account level)	<p>Shows all explicit permissions granted to the selected account either explicitly or through nested group membership on the managed computers.</p> <p>Access Explorer searches the database for each managed computer. This report lists the account, each listed managed computer, permissioned through accounts, resources, and the permissions granted to each resource.</p> <p>Running a report at this level can take a long time. Unless you need this information, you should consider drilling-down to a lower level and running the report.</p>
Explicit Permissions (run at the Computer level)	<p>Shows all explicit permissions granted to the selected account either explicitly or through nested group membership on the selected managed computer.</p> <p>Access Explorer searches the database for only the selected computer. This report lists the account, computer, permissioned through account, resource, and the permissions granted to each resource.</p> <p>Running a report at this level can take a long time. Unless you need this information, you should consider drilling-down to a lower level and running the report.</p>
Explicit Permissions (run at the Permissioned Account level)	<p>Shows all explicit permissions granted to the selected permissioned through account either explicitly or through nested group membership on the managed computers.</p> <p>Access Explorer searches the database for only the selected permissioned through account. If you select All Accounts, Access Explorer searches the database for each listed permissioned through account. This report lists the account, computer, permissioned through account, resource, and the permissions granted to each resource.</p>
Explicit Permissions (run at the Resource level)	<p>Shows all explicit permissions granted to the selected account either explicitly or through nested group membership on the managed computers.</p> <p>When you drill down to the Resource level, Access Explorer pulls resources for the selected Permissioned Account. The amount of data returned can be very large, so it is recommended that you apply a filter before running the Permissions Report. The report returns the data that displays.</p> <p>This report lists the account, computer, permissioned through account, resource, and the permissions granted to each resource. The applied filter prints on the cover page.</p>

Table 27. Access Explorer Permission Reports

Report Name	Description
Explicit Access Summary for Accounts	<p>Shows a summary of explicit permissions granted to accounts, including permissions derived through group membership. The report is based on the indexed file permission data collected by Access Explorer.</p> <p>This reports lists the account (including the number of resources with permissions), computer (including total number of resources with permissions), and then the number of resources (files, folders, and shares).</p>
Explicit Access Summary for Computers	<p>Shows a summary of explicit permissions granted to accounts on computers, including permissions derived through group membership. The report is based on the indexed file permission data collected by Access Explorer.</p> <p>This report lists the account, computer (including total number of resources), permissioned through account, and then the number of resources (files, folders, and shares).</p>

Generating a permissions report

Once the Access Explorer agent has reported that data is available for a specific server, the permissions report can be generated.

To generate a permissions report

- 1 To generate a report across all computers, right-click a user account, and select **Run Permission Report**.
-OR-
To generate a report for a specific computer, double-click a user account, right-click the computer, and select **Run Permission Report**.
- 2 Choose the permissions to include. You can select permissions assigned directly to the account or permissions assigned directly to the account and through group membership.
- 3 Select the resource types to include in the report. You can choose any combination of folder, file, and share, but the size of the report increases with multiple resource types selected.
- 4 To open the report in a print preview screen, click **Display On-screen**. You can page through the report and print any or all of the pages. To save the report as a PDF or other available formats, click **Export To**.
-OR-
To save the report as a CSV file, click **Export to CSV**. Choose the location where you want to save the file, and click **Save**. You have the option to open the exported file once it is created.

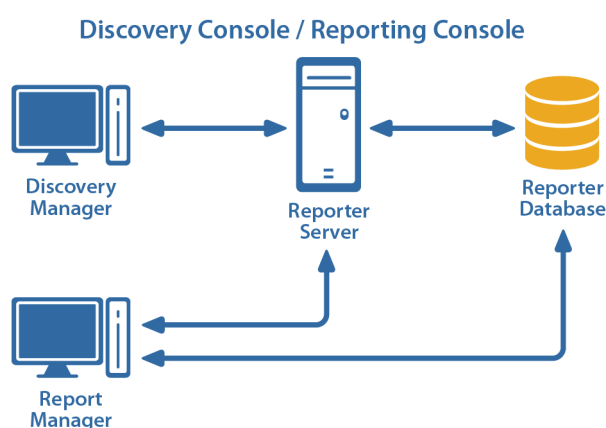
Troubleshooting Issues with Enterprise Reporter

- [Troubleshooting Connectivity Issues](#)
- [Troubleshooting Credential Change Failures](#)
- [Resolving Issues in the Report Manager](#)

Troubleshooting Connectivity Issues

Each console maintains connections to the Enterprise Reporter server and to the SQL database that stores Enterprise Reporter data. A loss of either connection causes problems. [Figure 4](#) outlines the connections between the components and the server and databases.

Figure 4. Connections between components and the server and databases.



Restoring a Connection to the Enterprise Reporter Server

There are a number of reasons why an Enterprise Reporter server may be down. When a console loses its connection to the server, it becomes unusable and must be restarted. All users connected to the Enterprise Reporter server are affected. You should check the following connections:

- The computer hosting the server is turned on and running properly.
- The Enterprise Reporter server service is running. If necessary, restart it using the Services console.
- You can reach the host computer over your network.
- The server host computer meets the minimum system requirements.

If the server has gone down and been restored since you last logged in, then the next time you connect, you will be informed that the server went down. If you are the main Enterprise Reporter administrator, this allows you to

be aware that your server has had issues. Intermittent failures over time may be due to instability in your network, problems on the server's host computer, or your SQL deployment.

Restoring a Connection to the Enterprise Reporter Database

If your server has lost its connection to the database, you can still open a console and connect to the server, but functionality will be limited. You will be unable to create discoveries, run reports or modify your configuration. Ensure that the SQL Server® hosting the Enterprise Reporter database is running, and that the server can access it.

The Report Manager maintains a direct connection to the SQL database, so ensure that the console's computer can also access the SQL Server®.


Troubleshooting Connection Timeouts

As Enterprise Reporter processes your requests, constant communication with the database is required. Depending on your network configuration, your Enterprise Reporter deployment, and the power of your SQL Server® host, the solution for timeout issues may vary.

You can fix timeout issues by either increasing the timeout in Enterprise Reporter, or by investigating any systemic or deployment issues. For example, perhaps your SQL Server® where the database is hosted is underpowered, or you have located your Enterprise Reporter server physically distant from your SQL Server®.

There are the following settings for each timeout configuration:

- **Connection timeout**
This is the amount of time given to make the initial connection to the database each time communication is needed. This is less likely to need adjustment. Timeouts are more likely due to SQL Server® or network issues than Enterprise Reporter specific problems. However, if you continually are seeing timeout errors, try increasing this setting.
- **Command timeout**
This is the amount of time allowed for the database to process requests. If you are getting timeout error messages during data collection, increase this setting.
- **Report Command timeout**
This is the amount of time allowed for report generation. If you are getting timeout errors messages during report generation, for interactive or scheduled reports, increase this setting.

 **NOTE:** Local administrative privileges are required to change timeout settings.

To change the database timeout settings for the Enterprise Reporter Server

- 1 Click System | Configuration.
- 2 Click Manage database settings used by Enterprise Reporter Server.
- 3 To change the time allowed to establish a connection, modify the Connection Timeout.
- 4 To change the time allowed to process a database command, modify the Command Timeout.
- 5 To change the time allowed to generate a report, modify the Report Command Timeout.

Troubleshooting Credential Change Failures

Each credential in the Credential Manager has three parts—an account name, a password and an optional description—and you can change any of them. While most changes should be processed smoothly, occasionally

issues in the network environment may prevent changes from being applied. When a change fails, you need to determine the reason, and then manually make the changes.

If a report schedule fails after changing a credential, it could mean that:

- Your credentials do not have access to the delivery share. Ensure the credentials are valid, and that they have write access to the share.
- Your credentials are not valid for your SMTP server. You can test the credentials in the SMTP configuration dialog box. For more information, see [Delivering Scheduled Reports by Email](#) on page 42.

Resolving Issues in the Report Manager

The Report Manager is used to generate reports using the data collected by the Configuration Manager. There are some issues that may occur while using this console.

What To Do if the Data in Your Report is Not What You Expect

There are a number of reasons why there may be no data or data that is unexpected. The following table outlines some of the possible problems and solutions.

Table 28. Possible Causes for Unexpected Report Results

Problem	Solution
Your report has different data than the last time you ran it, and you do not think it should.	Check your parameter values, and ensure that you are running the correct report. If you are running a scheduled report, ensure that no changes were made to the underlying report. For more information, see Scheduling Reports on page 41. If this does not address the issue, it is possible there is a data collection issue. Inform your Enterprise Reporter administrator. For more information, see the Dell Enterprise Reporter Configuration Manager User Guide in the Technical Documentation .
You supply values for the supplied parameters, but your report has no data.	The parameters are joined together with AND logic. This means that if you supply values for parameters, all the values have to be true for all data in the report. Remove the values and rerun the report to determine if this is the issue.
Your report does not return the data you were expecting, even with no values provided for the parameters.	Examine the report definition to ensure that fields you need are included in the report, and that there are no parameters that would prevent the expected data from appearing, including hidden parameters. If you need to customize the report, see Editing Reports on page 54 and Viewing Report Properties on page 39.
Your groups appear to have incomplete members.	Group membership is an option in NTFS and SQL discoveries. For more information, see the Dell Enterprise Reporter Configuration Manager User Guide in the Technical Documentation .
Your report does not have any data.	If no other solution works, it is possible that no data has been collected. Collections are performed using the Configuration Manager. Contact your Enterprise Reporter administrator to ensure a proper discovery is created to cover the scope of your report.
After upgrading, editing older reports can result in missing data for a field.	Check with your Enterprise Reporter administrator to see if the field is an extended field—extended attributes have (extended) after them. It is likely that is now collected by default, and you can replace the extended attribute with the default in the report.

Table 28. Possible Causes for Unexpected Report Results

Problem	Solution
Data does not seem to be updated for a specific field	Check with your Enterprise Reporter administrator to see if the field is still being collected. Administrators can manage which attributes are collected.
You have used the * wildcard as a parameter value, but no data is returned.	A number of parameters included in the Library reports have been specially developed to be easier to use. You must select values from the list of options in order to see results in your report.
You are scheduling a report, and you are denied access to a share.	Ensure that the Reporter server credentials have write access to the target share.
You need to change the format of the data in your report. For example, your report is showing a computer using the fully qualified domain name, and you would like it to show the common name.	Use a custom query report. To make things easier, you can copy the query from an existing report into a query editor, make the necessary changes, and then paste the new query into the custom query report.

Issues with Your Scheduled Reports

If problems occur during the running of a schedule, an error indicator (a red dot) appears on the scheduled report card, along with an error message providing you with information to help you address the issue.

An error indicator on a schedule card indicates that one or more of the scheduled reports has an error. Resolve the issue, and then either wait until the next scheduled run, or manually run any needed reports by clicking Run Now on the scheduled report card, or run the schedule by clicking Run All on the schedule card.

Other Issues

The following table outlines other issues that you may encounter using the Report Manager.

Table 29. Troubleshooting Report Manager Issues

Problem	Solution
Dragging and dropping does not work.	<p>Drag and drop works as follows:</p> <ul style="list-style-type: none"> • Moves reports between categories in a container. • Copies reports between containers. • Prevents moving or copying reports where you are not permitted—for example, into the Report Library.
You cannot create a report.	<p>Depending on your access level, you may not be able to create reports in Published Reports. You cannot add reports to the Library. If you want to add reports to Published Reports so that all users connected to the Reporter server can use the report, you can either copy the report and paste it into Published Reports, or you can import a report definition. For more information, see Copying Reports on page 52.</p>
Drop-down lists in parameter cards are empty.	<p>The drop-down lists are populated by data collected by discoveries. One reason for an empty list may be that there is no relevant data. Contact your Enterprise Reporter administrator or see the Dell Enterprise Reporter Configuration Manager User Guide in the Technical Documentation.</p> <p>If this is not the case, large data sets may take a while to appear on the drop-down list. In this case, you will see a progress indicator. Wait for the data to load, and proceed with your report.</p>

Table 29. Troubleshooting Report Manager Issues

Problem	Solution
Your reports timeout while generating.	You can increase the amount of time allowed to connect to the database using the System Configuration | Database Settings.
You get a warning about a linked report that is missing.	<p>This warning indicates that you are trying to drill down to a report that is missing. This may occur in the following situations:</p> <ul style="list-style-type: none">• The missing report was not copied from Published Reports to My Reports.• The report administrator did not make the missing report available in the Published Reports making it unavailable to copy to My Reports.• The missing report was copied from Published Reports to My Reports but was subsequently deleted. <p>The report administrator must ensure that the report listed in the warning has been published. For more information, see Publishing Reports on page 74.</p> <p>Then, you must copy the missing report from published reports to the location listed in the warning. For more information, see Copying Reports on page 52.</p>

Viewing Information About Your Enterprise Reporter Configuration

Understanding your system setup can be useful when troubleshooting. You can use the System Information page to determine where your console, Reporter server and Reporter database are hosted, what port the server is using to communicate, your software version, and other similar information you may find helpful in resolving issues.

To view system information in the Report Manager

- Click the System Information tab.

A

- Access Explorer
 - adding accounts, 79
 - drill-down accounts, 79
 - explore accounts, 79
 - generate permissions report, 84
 - maximum record display, 78
 - refresh cache, 78
 - reload database, 78
 - removing accounts, 79
 - viewing permissions, 82
- accounts
 - adding, 79
 - drill-down, 79
 - exploring, 79
 - removing, 79
- adding reports to a schedule, 47
- aggregates, 56

C

- cache refresh, 78
- change history reports, 11
- clearing a filter, 81
- computer reports, 12
- copy
 - categories, 52
 - reports, 52
- create
 - parameter, 63
 - report category, 51
 - report layout, 68
 - reports, 67
- creating a report schedule, 42
- credential manager, 32, 49
- critical capacity, 14
- csv file, 36
- custom filter
 - editing, 81
- custom filters, 81
- custom query report, 67, 88

D

- daily schedule

- reports, 46
- data cache
 - refresh, 78
- database
 - reload Access Explorer data, 78
- days until critical capacity, 14
- delete
 - parameter, 64
 - report category, 52
 - report schedule, 48
 - reports, 53
 - reports from a schedule, 48
- determining your software version, 89
- Developer Express, 66
- drag and drop, 88

E

- edit
 - parameter, 64
 - report layout, 65
- email
 - configure SMTP server, 43
 - delivering reports, 42
 - modifying templates, 45
- error
 - access denied (scheduling), 88
- expand nested groups parameter, 37
- Explore tab, 77
- export
 - report definition, 69
- exporting reports, 36, 40
- extend report types, 55

F

- field
 - aggregating, 56
 - described, 58
 - modifying, 55
 - sorting, 55
- file storage analysis, 14
 - file categories, 17
- filter
 - clearing, 81

- columns, 80
- create custom, 81
- resources, 81

filter, clearing, 80

G

- group membership
- viewing, 82

H

- hidden parameter, 59

I

- import
 - report definition, 69
- incomplete group members, 87

L

- layout, 65
- list of reports, 12, 21, 23

M

- modify
 - report example, 66
 - report fields, 55
- monthly schedule
 - reports, 46
- move
 - reports, 52
 - subcategories, 52
- My Reports
 - adding reports, 53, 54
 - described, 8

O

- optional parameter, 59

P

- parameter
 - creating, 58, 63
 - deleting, 64
 - described, 57
 - editing, 64
 - elements of, 58
 - empty list, 89
 - expand nested groups, 37
 - hidden, 59
 - operators, 58
 - optional, 59
 - required, 59
 - troubleshooting, 87

- performing calculations in reports, 56

- permissions
 - explicit permissions, 82
 - full permissions, 82
 - viewing, 82

- port
 - current port, 89

- Published Reports
 - described, 8, 74

R

- remove reports from a schedule, 48

- report
 - delivering by email, 42
 - scheduling, 41

- report categories, 51

- Report Library
 - described, 8

- report scheduling
 - creating a schedule, 42

- Report Types
 - Active Directory, 27
 - Common Objects, 28
 - Computer, 28
 - File Storage Analysis, 30
 - Included, 26
 - NTFS, 30
 - Registry, 31
 - SQL Server, 31

- report types
 - extending, 55

- Report Wizard
 - new layout, 66
 - new report layout, 68

- reports
 - adding to My Reports, 53, 54
 - changed data, 87
 - changing layout, 65
 - creating layout, 68
 - creating new, 67
 - custom query, 67
 - deleting, 53
 - exporting, 40
 - importing and exporting report definition, 69
 - incomplete group members, 87
 - list of report types, 26
 - list of reports, 8
 - change history, 11
 - computer, 12
 - file storage analysis, 14
 - NTFS, 23
 - registry, 26

- SQL, 21
- modification example, 66
- modifying email templates, 45
- modifying included fields, 55
- no data, 88
- parameter usage, 59
- prompts, 58
- scheduling, 41
- required parameter, 59
- resources
 - create custom filter, 81
 - filtering, 81

S

- scheduling
 - access denied error, 88
 - reports, 41
- scheduling reports
 - access denied, 88
 - adding reports, 47
 - delete report schedule, 48
 - parameter values, 47
 - remove reports, 48
 - troubleshooting, 49
 - types of schedules, 42, 45
- show full permissions, 82
- sort
 - columns, 80
 - fields in a report, 55
- SQL server
 - current database, 89
- system
 - information, 89

T

- time zone, 35, 65

V

- viewing
 - group membership, 82
 - permissions, 82

W

- warning messages
 - maximum record display, 78
- weekly schedule
 - reports, 46

Dell listens to customers and delivers worldwide innovative technology, business solutions and services they trust and value. For more information, visit www.software.dell.com.

Contacting Dell

Technical Support:

[Online Support](#)

Product Questions and Sales:

(800) 306-9329

Email:

info@software.dell.com

Technical Support Resources

Technical support is available to customers who have purchased Dell software with a valid maintenance contract and to customers who have trial versions. To access the Support Portal, go to <https://support.software.dell.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request system.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- Download software. For trial software, go to [Trial Downloads](#).
- View how-to videos
- Engage in community discussions
- Chat with a support engineer