SAS® IT Resource Management 3.6

Report Center Guide

SAS® Documentation

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SAS® IT Resource Management 3.6: Report Center Guide

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Contents

Using This Book

Audience

SAS IT Resource Management Report Center (hereafter called ITRM Report Center) provides information about the performance and capacity of IT infrastructures. This information addresses the needs of particular groups of people based on their roles and the tasks that they perform in an enterprise.

SAS IT Resource Management 3.6: Report Center Guide is designed for the following users:

- Members of the IT Resource Management Users group are the information consumers who are responsible for analyzing IT performance and capacity data and making decisions based on that data. These users are business people who are interested in the overall performance aspects of IT at a company. They often function as system architects, IT managers, line of business IT administrators, and IT executives. Information consumers use the reports that are generated by SAS IT Resource Management and often access them from the office as well as from remote locations.

  Information consumers typically use the documentation that is found in *SAS IT Resource Management 3.6: Overview* and in this document, *SAS IT Resource Management 3.6: Report Center Guide*.

- Members of the IT Resource Management Administrators group are IT performance analysts who are responsible for analyzing IT performance data, designing and creating reports that communicate IT intelligence, and making those reports available in ITRM Report Center to information consumers. These users analyze this data in order to best benefit the business and to improve the utilization, availability, and performance of IT resources and the IT enterprise. Performance analysts often function as capacity planners, system administrators, and business analysts.

Performance analysts typically use the documentation that is found in *SAS IT Resource Management 3.6: Reporting Guide*, although they might refer to all SAS IT Resource Management documentation.

- Data administrators are responsible for administering the IT Resource Management data marts and setting up the jobs that stage and aggregate IT performance data so that report-ready data is available for generating reports. Data administrators typically deploy and schedule the batch production jobs that prepare and generate the IT performance reports. They often function as IT performance managers and capacity planners.

  Data administrators typically use the documentation that is found in the *SAS IT Resource Management 3.6: Administrator's Guide*, although they usually refer to all SAS IT Resource Management documentation.

Prerequisites

Prerequisites for using SAS IT Resource Management are

- An operating environment that includes SAS IT Resource Management software.
- A user ID and password with permissions that are appropriate for that user's use of ITRM Report Center functions.
- A web browser that is supported by ITRM Report Center and, depending on the browser, extensions or plug-ins to enable ActiveX content to be viewed.

Accessibility

Accessibility

Accessibility Notice

For information about the accessibility of this product, see Accessibility Features of SAS IT Resource Management 3.6: Report Center at support.sas.com.

1

About ITRM Report Center

Overview of ITRM Report Center

ITRM Report Center is a web application that enables users to view, organize, filter, and share SAS IT Resource Management performance and exception reports. From the workspace bar, you can access the **Home**, **Gallery**, **Resource**, and **Administration** workspaces.

- The **Home** workspace enables you to access your personal watch lists, alerts, and recent work. This workspace is accessible to all users. For more information, see "Overview of the Home Workspace" on page 21.

- The **Gallery** workspace enables you to access folders, galleries, and albums that are used to organize and share SAS IT Resource Management reports. This workspace is accessible by all users. For more information, see "Overview of the Gallery Workspace" on page 32.

- The **Resource** workspace enables you to view SAS IT Resource Management reports from a hierarchical perspective for each resource in ITRM Report Center. This workspace is accessible only by users who are members of groups that are members in the IT Resource Management: Report Center User role or the IT Resource Management Report Center Administrators group. For more information, see "Overview of the Resource Workspace" on page 79.

- The **Administration** workspace is where some ITRM Report Center administrative tasks are performed. These tasks include creating SAS Content Server locations and assigning access to those locations to IT Resource Management Report Center User groups, purging reports, and refreshing the ITRM Report Center cache. This workspace is accessible by users who are members of the IT Resource Management Administrators group. For more information, see "Overview of the Administration Workspace" on page 93.

Benefits of Using ITRM Report Center

ITRM Report Center enables users to organize and view the reports that are created using SAS IT Resource Management. With ITRM Report Center, users can access three workspaces: **Home**, **Gallery**, and **Resource**. Administrators can access an additional **Administration** workspace.

You can use ITRM Report Center to perform the following tasks:

- Create, copy, edit, delete, and share folders that are used to group and categorize galleries, albums, and subfolders.
- Create, copy, edit, and delete galleries that are used to group and categorize performance and exception reports.
- Create, copy, edit, and delete albums that are used to quickly access IT Resource Management reports that are of specific interest.
- View IT performance and exception reports that are generated using SAS IT Resource Management.
- Filter galleries to view logical subsets of reports.
- Interact with ActiveX or Java reports to view data tips or drill down for more report detail.
- Work with reports hierarchically in the **Resource** workspace.
- On the **Home** workspace, subscribe to and view alerts that result from the detection of exceptions.
- Establish watch lists that can be viewed from the **Home** workspace.
- Email or share reports with other users.
- Manage access to reports stored in the SAS Content Server.

Note: For more detailed descriptions of the tasks that can be performed in each workspace of ITRM Report Center, see these topics:

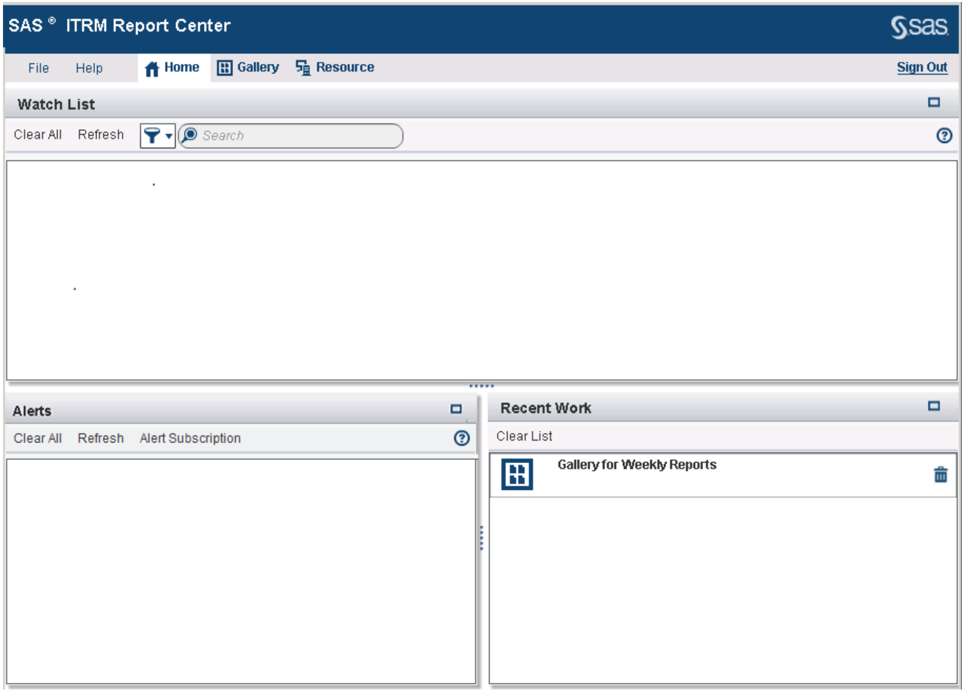
- Overview of the Home Workspace on page 21.
- Overview of the Gallery Workspace on page 32.
- Overview of the Resource Workspace on page 79.
- Overview of the Administration Workspace on page 93.

Access to ITRM Report Center workspaces and the features that are available in those workspaces is granted to users based on the SAS roles and groups that are assigned to users of this web application. For more information about SAS roles, groups, and capabilities, see "ITRM Report Center Users and Groups" on page 13.

Introduction to ITRM Report Center Workspaces

When you sign in to ITRM Report Center, the workspace bar and **Home** workspace appear.

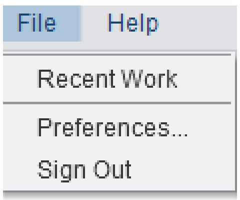
Display 1.1 Main Window of ITRM Report Center



Also available on the workspace bar of all ITRM Report Center workspaces are the **File** and **Help** menus, and the **Sign Out** button.

- The **File** menu enables you to perform general tasks. This menu is accessible by all users.

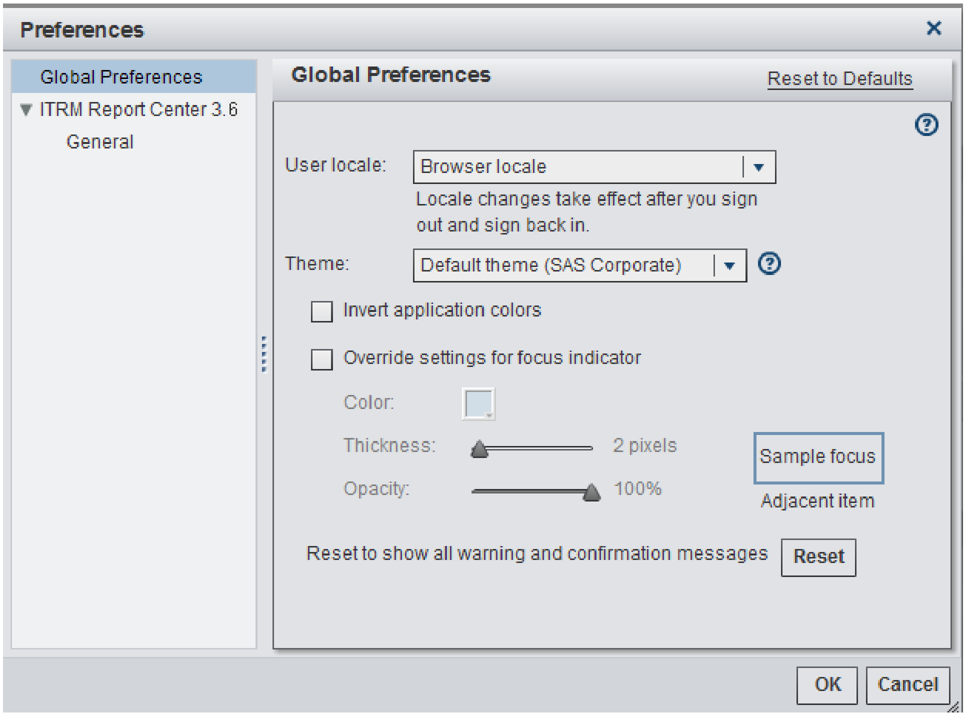
  Display 1.2 File Menu

  As shown here, you can perform these actions:

  - Access your recent work.
  - View and modify your global preferences and the general preferences for ITRM Report Center.

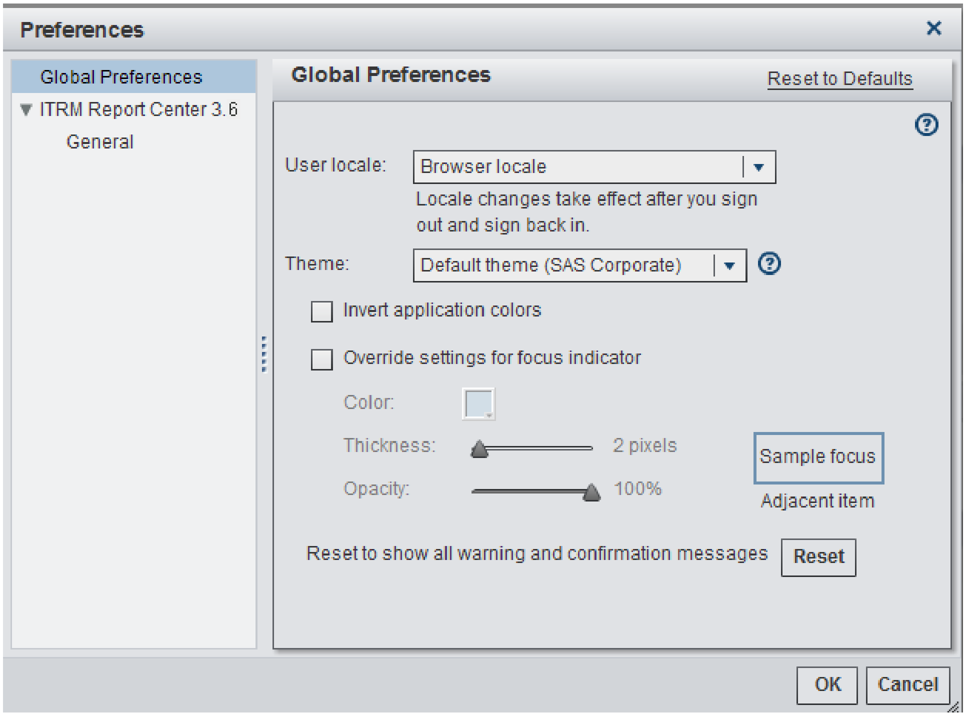
Display 1.3 Global Preferences



Note: For information about working with the options on the Preferences dialog box, click this Help icon: .

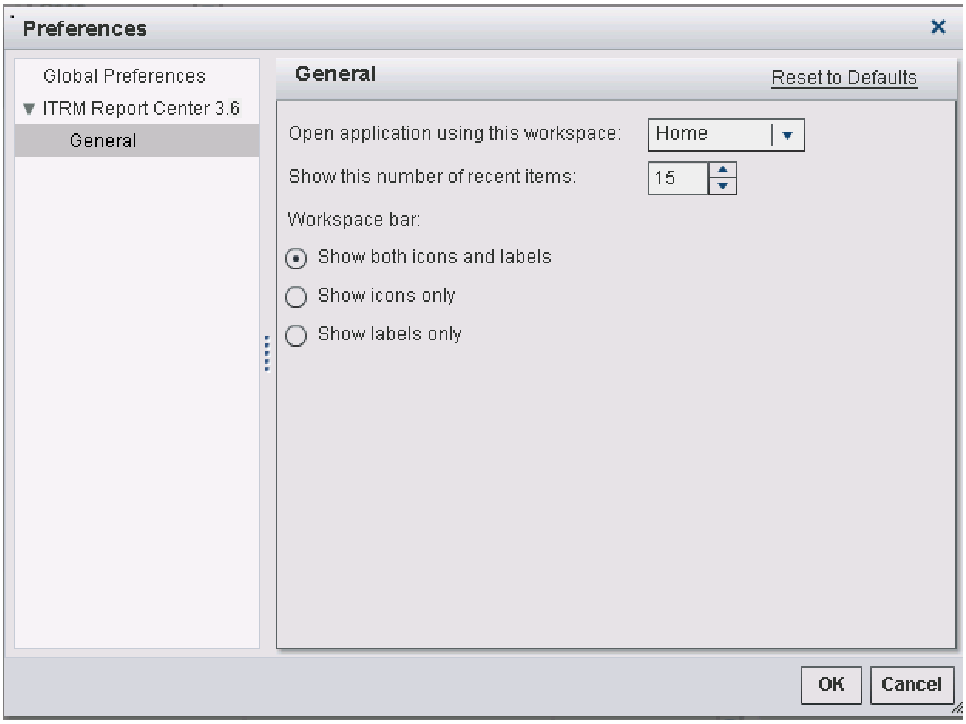
- View and modify your ITRM Report Center general preferences. Selecting a language from the drop-down list of the **User locale** field, you can specify the preferred language for your browser. You can also specify your preferred color and style in the Theme section of the window. Click the question mark to display help for these fields.

Display 1.4 *Global Preferences*



Select **ITRM Report Center 3.6** ▶ **General** to open the General window.

Display 1.5 *General Preferences*



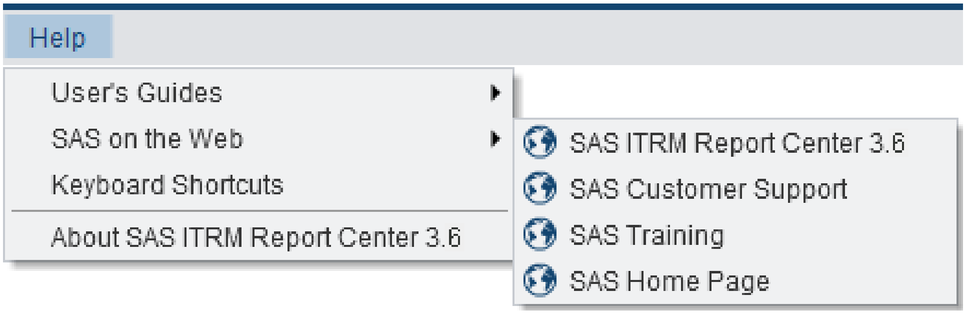
On the that window, you can perform the following actions:

- Use the drop-down list to specify the workspace that you want to open when you sign in. (The workspaces that are available vary based on your role. For example, if you signed on with an IT Resource Management: Report Center User role, then you can select one of these workspaces: **Home**, **Gallery**, or **Resource**.)
- Use the spinner to change the number of items that you want to display in the **Recent Work** section of the **Home** workspace.
- Click the appropriate option to specify whether you want the workspace bar to show icons only, labels only, or both icons and labels.

- Sign out of the application.

- The **Help** menu provides access to documentation that is available from the SAS web. This menu includes information about customer support, training, the SAS home page, links to documentation that is specific to ITRM Report Center, and SAS

IT Resource Management Report Center configuration details. The configuration details are available from **About SAS ITRM Report Center 3.6**.



Note: All workspaces also show a status bar at the bottom of the workspace. The status bar shows notification messages. The messages can include information the status of job execution, cache refreshment, report purges, or user group location changes.

The **Sign Out** button immediately disconnects you from the ITRM Report Center application.

How to Get Help and Documentation for ITRM Report Center

ITRM Report Center provides the following two types of documentation:

Embedded Help

Help pop-ups and tooltips provide brief descriptions of various tasks and fields to help you use ITRM Report Center effectively.

To access a Help pop-up for more information about a current topic, click the Help icon () when it appears next to a field or area in the user interface (UI). You can also place the mouse pointer over an element in the UI to view the associated tooltip for more information.

SAS IT Resource Management 3.6: Report Center Guide
This document provides detailed information about the concepts and tasks that are related to using ITRM Report Center. To access this document, click **Help** ► **User's Guide** in the application.

Additional documentation and references are also available from the **Help** menu in ITRM Report Center. To access these resources, click **Help** in ITRM Report Center application and select from the following menu options:

- **SAS on the Web** includes the following options:
  - **SAS IT Resource Management Report Center 3.6** opens the SAS IT Resource Management documentation page on the web. This page provides access to all the documentation (PDF and HTML) for this SAS IT Resource Management solution.
  - **SAS Customer Support** opens the SAS Customer Support page. This page provides access to the Knowledge Base, Support, Training and Bookstore, and more.
  - **SAS Training** opens the Training and Bookstore page.
  - **SAS Home Page** opens the SAS home page at http://www.sas.com.
- **About SAS ITRM Report Center 3.6** provides more information about the version of the application and related details.

Accessing ITRM Report Center

Signing in as a Registered User

Access to some ITRM Report Center workspaces and functions is controlled by SAS metadata-based application roles. Permission to access SAS Content Server locations where IT Resource Management reports are available is controlled by SAS metadata-based application groups. Membership in roles and groups is established and maintained by your SAS administrator using SAS Management Console. For more information about groups and roles, see *SAS Management Console: Guide to Users and Permissions*.

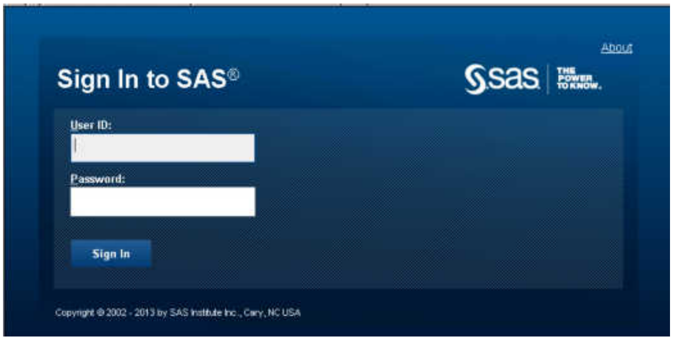
To sign in to ITRM Report Center, perform the following steps:

1 In the address bar of your web browser, enter the URL for ITRM Report Center. For example, to access your ITRM Report Center, your URL might be `http://<Middle-Tier-Server-Name>/ITRMReportCenter` or `http://<Middle-Tier:Port#>/ITRMReportCenter`.

Then press Enter. The **Sign In to SAS** window appears.

Note: Contact your ITRM Report Center administrator if you do not have the URL for ITRM Report Center.

Display 1.6 *ITRM Report Center Sign in Window*



2 Enter a valid user ID and password. Your user ID and password are case-sensitive.

3 Click **Sign In**. The ITRM Report Center interface appears.

Note: Unexpected results might occur if you use the same authentication credentials to open and operate multiple sessions of the ITRM Report Center web application at the same time.

Running ITRM Report Center on the Secure Sockets Layer Protocol

ITRM Report Center can be run on the Secure Sockets Layer (that is, the HTTPS protocol). The *Secure Sockets Layer (SSL)* is the standard security technology for creating an encrypted link between a web server and a browser. This link ensures that all data passed between the web server and browser remains private and secure. To generate an encrypted link, a web server requires an SSL Certificate. For more information, see *Encryption in SAS 9.4*, which is located here: Encryption in SAS(R) 9.4.

Logging Level of ITRM Report Center

After installing ITRM Report Center, the logging level is set by default to `Warn`. Only those logging messages that are set for WARN, ERROR, or FATAL will appear in the ITRMReportCenter log file. Logging messages that are set for DEBUG or INFO will not appear.

Special Consideration for Clustered Middle-Tier Environments

Your administrator might create a new root path that your group is assigned to when you log on. If that root path does not belong to the local web application cache, it might not be refreshed unless you have access to that path.

A message is displayed in the status bar when a cache starts to be refreshed. If you see that message, you should not perform any operation until you see a message saying that the cache at your location completed successfully. Otherwise, you might not see the reports of newly updated cache root or you might experience other processing problems.

Signing Out of ITRM Report Center

To sign out from ITRM Report Center, click **Sign Out** in the upper right corner of the UI.

By default, if ITRM Report Center is open for 30 minutes with no activity, then a warning message appears. The message states that due to inactivity, your session will time out. It provides the amount of time that remains before the session times out. You can continue the session or sign out.

ITRM Report Center Users and Groups

Understanding Groups, Roles, and Capabilities

Membership in IT Resource Management groups and roles is necessary in order to work with ITRM Report Center.

Note: Membership in SAS IT Resource Management groups and roles is not necessary to work with the SAS IT Resource Management client.

Using the **User Manager** component of SAS Management Console, the SAS administrator can manage users, groups, and roles. A group's membership in a role determines the SAS application capabilities for the users in that group. Typically, users are members of groups and groups are members of roles.

Here are some definitions of the terms that pertain to this topic:

Group

A *group* is a set of users. Membership in a group provides the member with the ability to access certain objects. Using groups facilitates setting security on objects, such as assigning access to the SAS Content Server locations where SAS IT Resource Management reports are available.

CAUTION! ITRM Report Center does not support nested groups for the IT Resource Management Report Center Users group. For this reason, to create a new IT Resource Management Report Center group, add the IT Resource Management: Report Center role to that group.

If you want to create an administrators group, make that group a member of the supplied IT Resource Management Report Center Administrators group.

Role

A *role* determines the capabilities that you have when you use a SAS application. Membership in a role provides the member with the capability to perform a task. The role controls the availability of application capabilities (or features) such as access to ITRM Report Center workspaces.

Note: Each role provides multiple capabilities. Your administrator can assign you to the groups that are members of the appropriate roles for the SAS work that you perform.

Capability

A *capability* is a SAS application feature that is under role-based management. Anyone who is a member of a role or who inherits a role through its group membership has all of that role's capabilities. For example, a capability might be the ability to perform the duties of an IT Resource Management Report Center administrator in ITRM Report Center.

For more information about defining sign-in metadata for users, see the *SAS 9.4 Intelligence Platform: Security Administration Guide*. This document can be found in the **Administration Documentation** section of the SAS Intelligence Platform documentation that is available at this location: http://support.sas.com/documentation/onlinedoc/intellplatform/index.html.

User Authorization

When SAS IT Resource Management is installed, two SAS metadata-based application groups are created to control access to ITRM Report Center workspaces and functions: IT Resource Management Report Center Users and IT Resource Management Report Center Administrators. In addition, for all SAS applications, a group called SASUSERS is established. SAS administrators can define additional users and groups as part of the setup tasks for SAS IT Resource Management.

Each user who is established with a metadata identity in SAS Management Console can be a member of a group that is assigned capabilities through a role.

Table 1.1 *Groups That Are Supported by ITRM Report Center*

Application Groups	Roles	Capabilities	Notes
SASUSERS	(not applicable)	Has limited access to the **Home** and **Gallery** workspaces (if not a member of any other group)	SASUSERS are users who have metadata identities.
IT Resource Management Report Center Users	IT Resource Management: Report Center User	Has access to ITRM Report Center **Home**, **Gallery**, and **Resource** workspaces	
IT Resource Management Report Center Administrators	IT Resource Management: Report Center Administrator	Has access to all ITRM Report Center workspaces and functions	
SAS Administrators (members of the Metadata Server: Unrestricted role)		Has access to the **Administration** workspace	SAS administrators cannot access the other workspaces of ITRM Report Center.

SAS administrators can use SAS Management Console to assign individual users to groups that are members of roles with capabilities that are appropriate for the work that they perform. For more information about how to use SAS Management Console, see Chapter 2, “Preparing to Work with the SAS IT Resource Management Client,” in the *SAS IT Resource Management 3.6: Administrator’s Guide*. To locate the SAS IT Resource Management documentation, use the Products Index at http://support.sas.com/documentation/index.html.

About the SASUSERS Group

The most basic access to ITRM Report Center is granted to users who are members of the SASUSERS group. Members of this group have limited access to the **Home** and **Gallery** workspaces. They can also use the functions of these workspaces such as viewing shared galleries and creating folders and albums that are not restricted by metadata roles. SASUSERS have access to reports that are stored in the SAS Content Server location that is defined in the ITRM Report Center **Administration** workspace.

SASUSERS group members are those users who have a SAS metadata identity on the IT Resource Management metadata server. They are implicitly defined by SAS as described in the **Members** property for this group in SAS Management Console.

The following table shows the capabilities that are available to SASUSERS.

Table 1.2 *Table of ITRM Report Center Capabilities for SASUSERS*

Capability	SASUSERS
Home Workspace	Yes **Note:** The Alerts pane and the **Show Related Report** action of the Watch List pane are not available.
Gallery Workspace	Yes
Folders	Yes **Note:** SASUSERS can create, edit, delete, copy, and share personal folders.
Access to Galleries	Yes **Note:** SASUSERS can access galleries that are shared with them. SASUSERS can also access reports in those galleries that are in SCS locations to which they have access.
Albums	Yes **Note:** SASUSERS can create, edit, delete, share, and copy personal albums.
Access to Exception Reports	Yes
Watch Lists	Yes
Email Reports	Yes

About the IT Resource Management Report Center Administrators Group and the IT Resource Management Report Center Users Group

Other users access ITRM Report Center with specific groups and roles that allow them to perform ITRM Report Center functions. These are the IT Resource Management Administrators group and the IT Resource Management Report Center Users group.

- Users who are members of the IT Resource Management Report Center Administrators group have full access to ITRM Report Center workspaces and functionality.

  Any user who administers ITRM Report Center must be a member of the IT Resource Management Report Center Administrators group that is supplied when SAS IT Resource Management is installed.

- Users who are members of the IT Resource Management Report Center Users group have access to ITRM Report Center **Home**, **Gallery**, and **Resource** workspaces and the full functionality in each.

Note: SAS IT Resource Management supports multiple IT Resource Management Report Center Administrators groups and IT Resource Management Report Center Users groups.

Permission to access the SAS IT Resource Management performance and exception reports stored in the SAS Content Server is granted based on the SAS metadata-based application group to which a user belongs. By default, SAS IT Resource Management reports are written to `<Middle-Tier-Server-Name>/SASContentServer/repository/default/sasdav/ITRM` and all ITRM Report Center users have access to this location. Multiple SAS Content Server locations can be used to permit and restrict groups of users to access SAS IT Resource Management reports.

Note: For more information about using multiple SAS Content Server locations, see "Overview of the Administration Workspace" on page 93.

Members of the IT Resource Management Report Center Administrators group are members of the IT Resource Management: Report Center Administrator role. Members of the IT Resource Management Report Center Users group are members of the IT Resource Management: Report Center User role. The following table shows the capabilities that are available for these IT Resource Management: Report Center roles.

Table 1.3 *Table of ITRM Report Center Capabilities for Users and Administrators*

Capability	IT Resource Management: Report Center User Role	IT Resource Management: Report Center Administrator Role
Administration Workspace	No	Yes
Home Workspace	Yes	Yes
Gallery Workspace	Yes	Yes **Note:** The **Edit** button is not enabled for this role while working on the `Users' Galleries and Albums` folder. Therefore, the administrator cannot modify the gallery objects of another user.
Resource Workspace	Yes	Yes
Folders	Yes	Yes **Note:** Administrators can also copy and delete the folders of other users.
Galleries	Yes	Yes **Note:** Administrators can also copy and delete the galleries of other users.
Albums	Yes	Yes **Note:** Administrators can also copy and delete the albums of other users.
Exception Reports	Yes	Yes

Capability	IT Resource Management: Report Center User Role	IT Resource Management: Report Center Administrator Role
Alerts	Yes	Yes
Watch Lists	Yes	Yes
Email Reports	Yes	Yes
Administrative Tasks	No	Yes **Note:** For information about administrative tasks, see "Overview of the Administration Workspace" on page 93.

Note: ITRM Report Center capabilities that are not restricted by role are available to the IT Resource Management: Report Center User role. Similarly, the capabilities of the IT Resource Management: Report Center User role are available to the IT Resource Management: Report Center Administrator role.

About the Metadata Server: Unrestricted Role

User IDs with the SAS Metadata Server: Unrestricted role can access SAS Management Console to assign and manage ITRM Report Center roles, groups, and users. The SAS Metadata Server: Unrestricted role is also used to manage the IT Resource Management application configuration properties. The following documentation provides pertinent information:

- *SAS 9.4 Management Console: Guide to Users and Permissions*
- *SAS 9.4 Intelligence Platform: Security Administration Guide*
- *SAS IT Resource Management 3.6: Administrator's Guide*

Note: Locate this documentation by using the Products Index A-Z at http://support.sas.com/documentation/index.html.

User IDs with the SAS Metadata Server: Unrestricted role can view and manage files and WebDAV folders in the SAS Content Server. Using the **Administration Console** component of the SAS Content Server, you can view, delete, and set permissions for WebDAV folders and files. For more information see “Using the SAS Content Server Administration Console” in the *SAS 9.4 Intelligence Platform: Middle-Tier Administration Guide*.

Note: User IDs with the SAS Metadata Server: Unrestricted role should not be used to access ITRM Report Center. If a user with the SAS Metadata Server: Unrestricted role accesses ITRM Report Center, then access is limited to the **Administration** workspace only. This ITRM Report Center restriction is in effect to avoid situations where users with the SAS Metadata Server: Unrestricted role create ITRM Report Center objects that cannot be managed by members of the IT Resource Management Report Center Administrators group.

Additional Notes about Roles, Capabilities, and Groups

A role manages the availability of capabilities such as menu items. This list highlights key points:

- Roles are used to manage SAS application capabilities.
- Roles and groups serve distinct purposes. You cannot assign permissions to a role or capabilities to a group.
- Capabilities are always additive. Assigning someone to a role never reduces what that user can do.

TIP Creating groups can simplify security management. For best results, consider the following advice:

- It is not advisable to create a custom role and assign that role to a group. For best results, create a group and assign the supplied roles to it.
- It is more efficient to assign permissions to groups than to individual users.

2

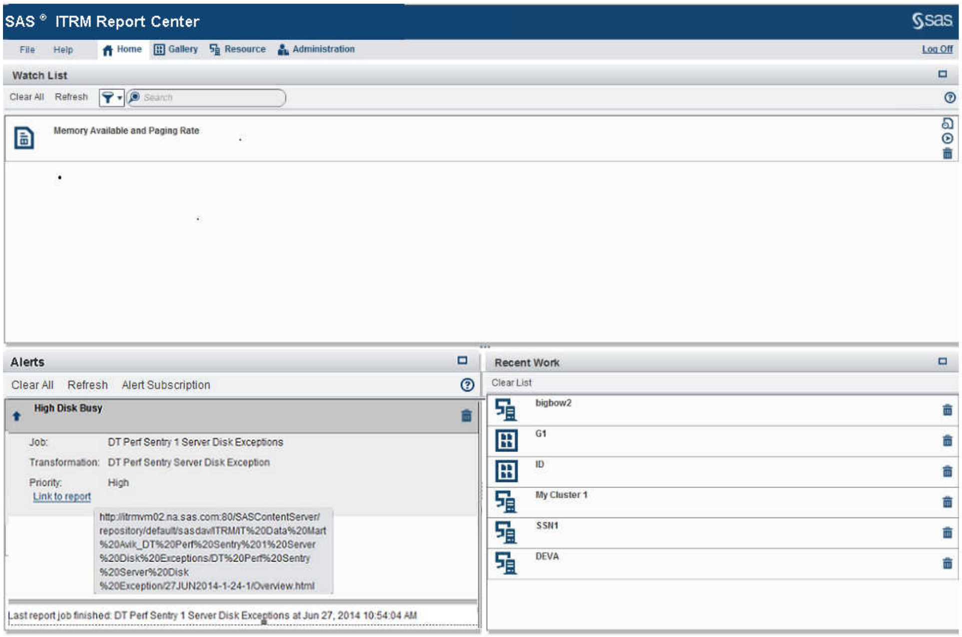
The Home Workspace

Overview of the Home Workspace

The **Home** workspace is accessible to all users who sign in to ITRM Report Center. (Some features might not be available to you depending on your sign-in credentials.)

Here is an example of the workspace.

Display 2.1 *Home Workspace*



Note: For more information about how to access ITRM Report Center and the purposes of the roles, capabilities, and user groups that are associated with the application, see "Accessing ITRM Report Center" on page 10.

About the Home Workspace

The **Home** workspace consists of these three windows:

- Watch List

  The Watch List window consists of galleries, albums, and reports that you access frequently. In other words, these items are your favorites.

  A report can be saved on the watch list to render the latest instance of the report (by using a dynamic link to it). To add an object to the watch list, select that object and click the Add to Watch List icon () on the workspace bar.

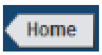
The watch list can consist of no more than 25 items by default. However, the ITRM administrator can change the number of items.

- Alerts

  An *alert* is a subscription-based notification that results from the IT Resource Management exception analysis feature. In ITRM Report Center, the Alerts window consists of reports that were generated when the criteria specified in an exception definition were satisfied. Alerts are specified using the IT Resource Management client in the Exception transformation. By subscribing to different types of alerts, you can specify that an alert is posted to the Alerts panel of the **Home** workspace if an exception is detected. Alerts are presented in date order – the newest are shown first.

- Recent Work

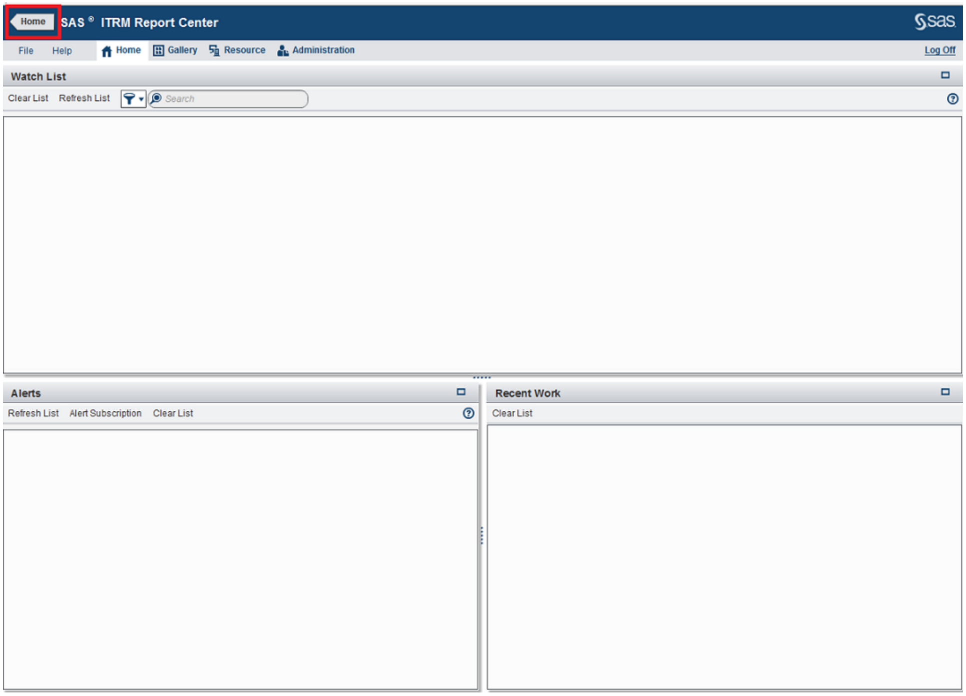
  The Recent Work window consists of a list of the galleries, albums, resources, and folders that you worked on recently.

If ITRM Report Center was launched from the SAS Virtual Analytics Hub, the banner of the **Home** workspace contains the 

button. This button links the user back to the SAS Virtual Analytics Hub. The following display shows 

outlined in red.

Display 2.2 *Home Workspace*



Tasks That Can Be Performed in the Home Workspace

Tasks That Can Be Performed in the Watch List Window

In the Watch List window, you can manage the items that are on your list. ITRM Report Center objects are added to the watch list when you select those items and click the Add to Watch List icon () on the workspace bar.

- To open or delete a watch list item or to show related reports, use the icons for those functions. The icons are shown on the right side of each watch list item row.
- To delete all items from your watch list, click **Clear All**.

Note: If no watch list items appear, then the **Clear All** button is disabled.

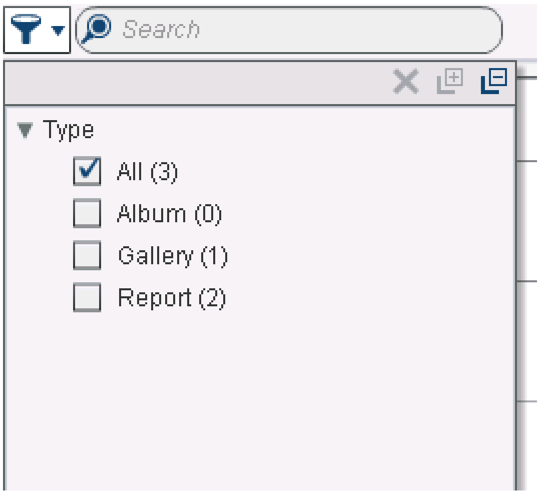
- To update all items on your watch list, click **Refresh**.

  Note: Updating all watch list items includes the update of all gallery objects that were modified or deleted after they were added to the watch list. This action does not include removal of any report links that were deleted or removed from SAS Content Server after they were added to the watch list.

- To filter the type of items on your list, perform the following steps:

  1. Click the Filter icon () . Use the down arrow (▼) to display the types of items that can be viewed on the watch list.
  2. The following dialog box is displayed.

     Display 2.3 *Watch List Items Dialog Box*

  3. Check the box next to the type of item that you want to view on the watch list.
  4. Click in the white space of the Watch List window to accept your selection and return to the watch list.

- To search, enter into the **Search** field the item that you want to locate in the watch list.

- To view reports that are related to a Watch List report item, select the report and click the Show Related Report icon ( ). (The Show Related Report icon appears for report items only.)

  Note: If you signed in as a member of the SASUSERS group, you cannot show related reports of the watch list.

- To view related reports in the **Resource** workspace, click the Show Related Items icon ( ).

- To view the highlighted report, click the Open icon ( ).

- Click the Delete icon ( ) to delete the highlighted item.

Tasks That Can Be Performed in the Alerts Window

About the Alert Window

If you are signed in as a member of the SASUSERS group, the Alerts window is not available.

In the Alerts window, you can perform the following tasks:

- “Subscribe to the Type of Alert Notification” on page 27
- “Update the List of Alert Notifications” on page 28
- “Delete an Alert Notification” on page 28

Alerts are not generated if any of the following conditions are true:

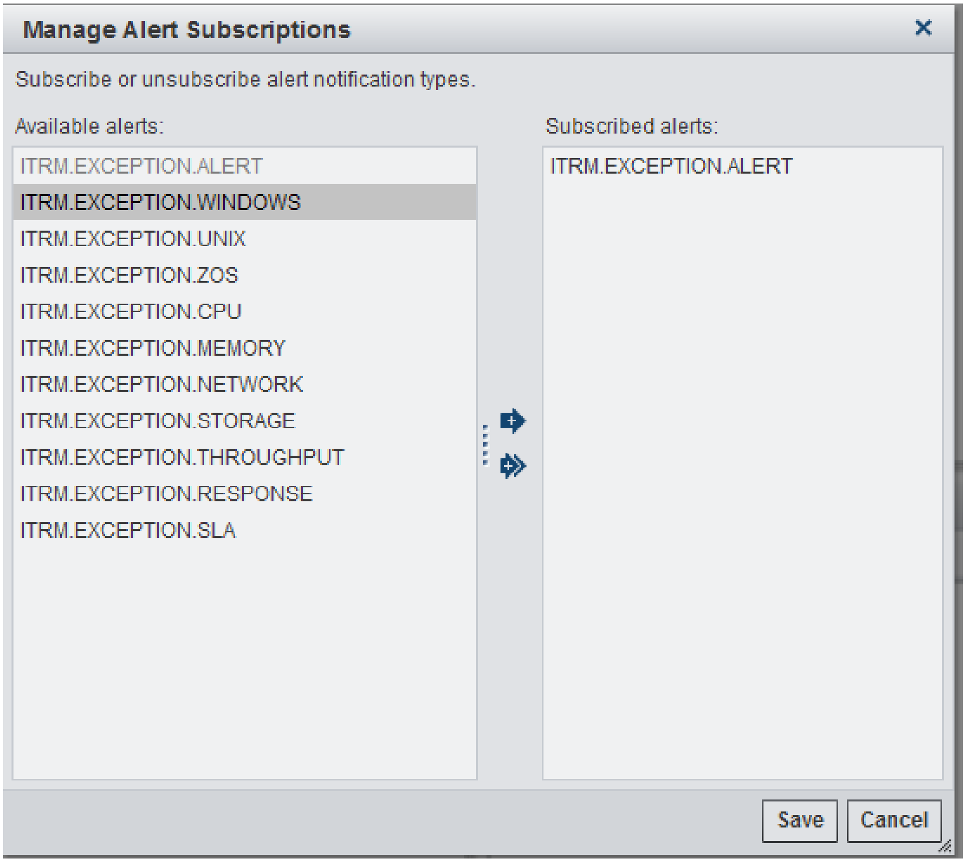
- This system is not configured with a middle tier.
- The user turned reporting off. In other words, the **Generate exception reports** parameter on the **Report Parameters** tab of the exception job is set to `No`.
- The user turned alerts off. In other words, the **Publish alerts** box on the **Report Notifications** tab of the exception job is not checked.

Subscribe to the Type of Alert Notification

To be notified about an exception that has been detected, perform the following steps:

1 Click **Alert Subscription**. The following dialog box appears.

Display 2.4 *Alert Notification Dialog Box*



Note: In the previous display, the user is alerted to any exceptions.

2 From the **Available alerts** list, select the type of alert that you want to be notified about. Click the arrow to move the selected exception to the **Subscribed alerts** list.

3 Click **Save**.

TIP To view alerts in the **Home** workspace, you must first subscribe to the alert in the Manage Alert Subscriptions dialog box. Then run the job that contains the Exception transformation. If exceptions are found, they can be viewed in the Alerts pane of the **Home** workspace.

You can specify that an alert notification is generated when an exception is detected by using the **Notifications** tab of the Exception transformation. For more information, see Step 7 of “Specify the Properties of the Exception Transformation” in Chapter 10, “Exception Analysis Processing” in the *SAS IT Resource Management 3.6: Administrator’s Guide*.

If you receive an alert notification concerning a report that resides in a repository for which you do not have permission, you cannot open the report. A message is displayed indicating that you cannot access the report because you do not have the appropriate permission. Similarly, if the repository that contains the report is deleted by an ITRM Administrator and you receive an alert notification concerning a report that resided in that repository, then a message is displayed indicating that you cannot access the report because the repository does not exist.

Update the List of Alert Notifications

To update the list of alert notifications with the most recent information, click **Refresh**.

Delete an Alert Notification

To delete one alert notification from the window, select the alert notification and click the Delete icon ( ).

To delete the list of alert notifications, click **Clear All**. This action removes the alert notifications from the view of the **Home** workspace. It does not change your alert subscription settings.

Note: If no alert notifications appear, then the **Clear All** button is disabled.

Tasks That Can Be Performed in the Recent Work Window

In the Recent Work window, you can remove an individual item from the list, or you can remove all your recent work from the list.

- To remove an individual item from the list, click .
- To remove all your recent work from the list, click **Clear List**.

3

The Gallery Workspace

Overview of the Gallery Workspace

On the **Gallery** workspace, you can work with folders, galleries, and albums. Here is a description of these objects:

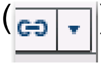
- Folders

  A *folder* is a container for galleries, albums, and other folders. These folders function like typical folders in a tree. You can use these folders to group related galleries and folders. For example, you might create a single folder to include all of your galleries for DT Perf Sentry reports.

- Galleries

  A *gallery* is a group of reports that share common filter values. You can organize SAS IT Resource Management reports by creating a gallery that includes all of the reports that meet a specific criterion. For example, you might create a gallery to include all available reports for a particular machine, adapter data source, or keyword. When viewing a gallery in the **Gallery** workspace, you can further subset or filter the reports in a gallery for viewing. Thus, you can quickly view a smaller set of reports in a gallery to measure and analyze the utilization, availability, performance, and statistical trends of IT resources for your enterprise.

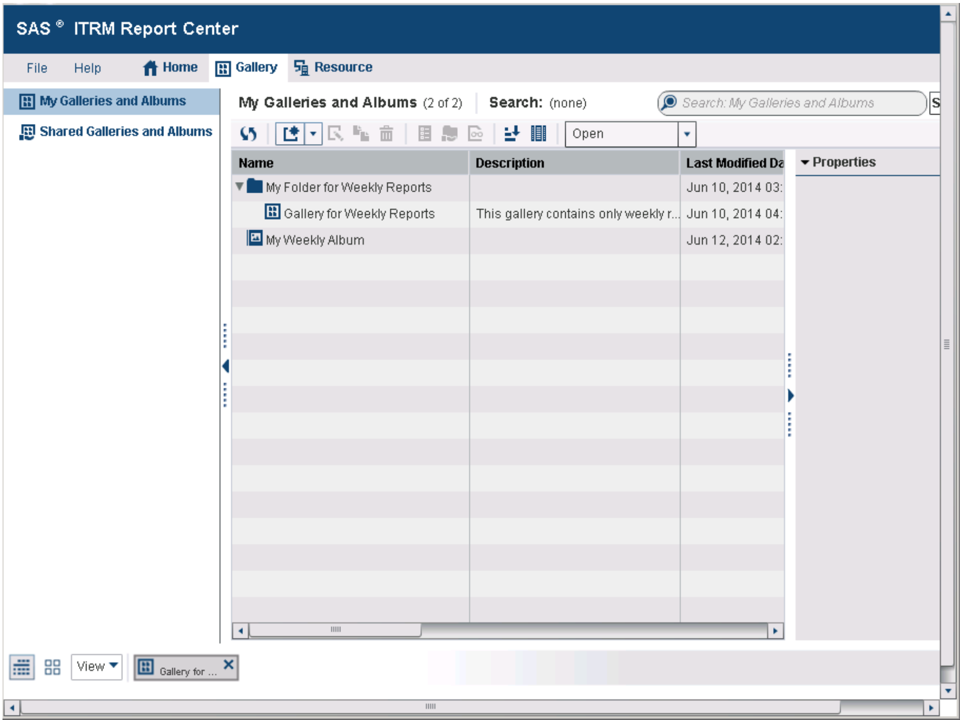
- Albums

  Albums are containers for reports that you want easy access to. Think of them as point-and-click-galleries. When you open an album, it resembles and behaves like a gallery. Galleries and albums differ only in how they are created. A gallery is created with the New Gallery wizard. It is modified by using the Edit Gallery wizard. An album is created by selecting reports from existing galleries and using the Copy Link to Album icon () on the workspace bar. You do not use a wizard to create or edit it.

Note: Galleries and albums are not deleted unless you delete them manually.

When any ITRM Report Center user who belongs to the IT Resource Management Users group logs in to the application, the following view of the **Gallery** workspace is available.

Display 3.1 *Gallery Workspace for a User*

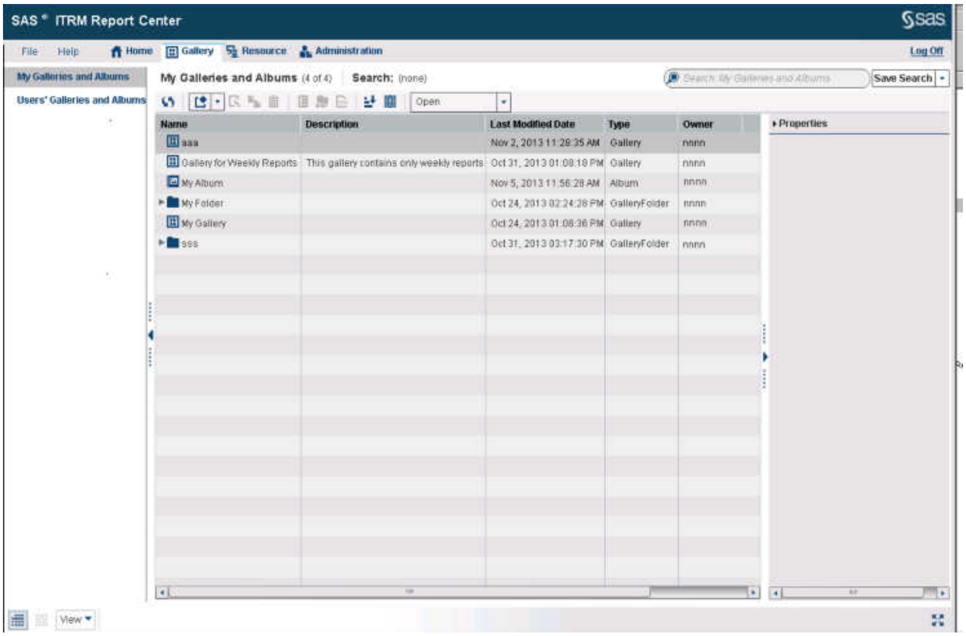


Galleries and albums that you own are grouped separately from galleries and albums that are shared with you. Your galleries and albums are stored in a folder named **`My Galleries and Albums`**. Galleries and albums that are shared with you are stored in a folder named **`Shared Galleries and Albums`**.

On the **Gallery** workspace, you can choose to work with your galleries and albums. You can also work with galleries and albums that have been shared with you by selecting the appropriate folder in the left pane.

When any user who belongs to the IT Resource Management Administrators group logs in to the application, the following view of the **Gallery** workspace is available.

Display 3.2 Gallery Workspace for an Administrator

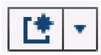


Note: The `Users' Galleries and Albums` folder shows all the galleries and albums that were created by other users.

The following display shows the workspace bar that is available when you are working with objects in either the `My Galleries and Albums` folder or the `Shared Galleries and Albums` folder.

Display 3.3 Workspace Bar of the Gallery Workspace

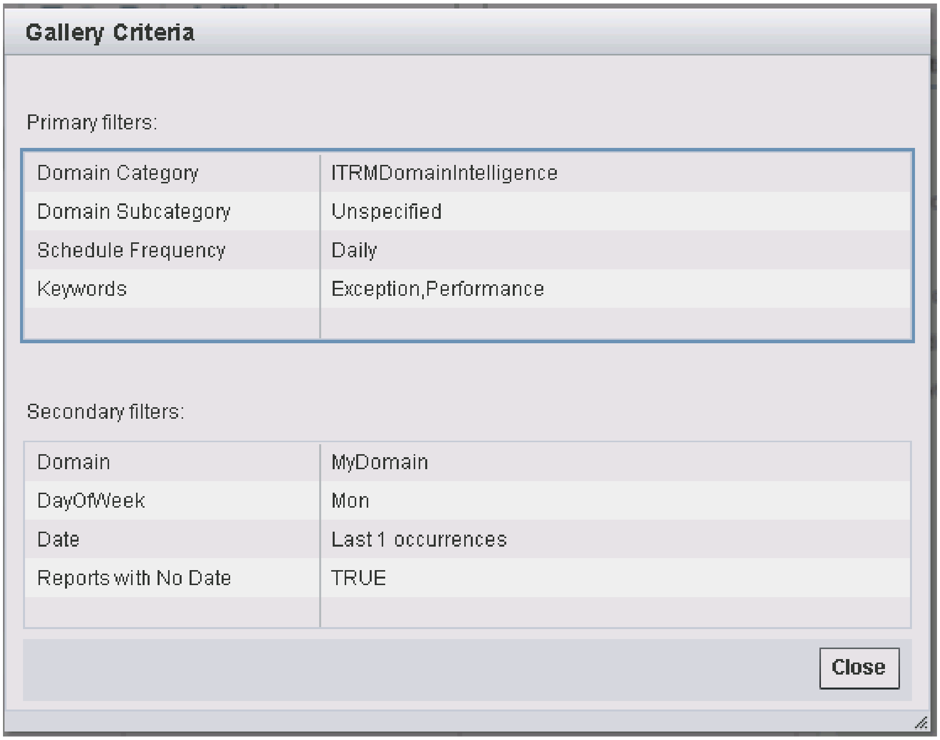
The main features of the **Gallery** workspace are accessed from the workspace bar. The workspace bar of the **Gallery** workspace contains the following icons:

-  refreshes the workspace with the latest information.
-  opens this menu of objects to create: 

  Select the type of object that you want to create. The corresponding dialog box appears.

  - If you select **New Gallery**, the New Gallery wizard opens. For more information, see "Create a Gallery" on page 45.
  - If you select **New Album**, the New Album dialog box appears. For more information, see "Create an Album" on page 59.
- If you select **New Folder**, the New Folder dialog box appears. For more information, see "Working with Folders" on page 37.
-  edits the selected item.
-  copies the selected item.
-  deletes the selected item.
-  displays the criteria of the selected gallery.

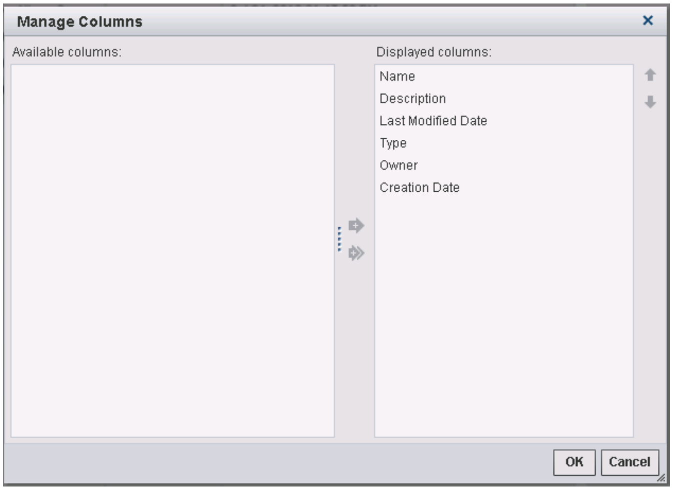
Display 3.4 *Gallery Criteria*



-  shares the selected top-level folder.
-  adds the selected gallery, album, or report to the **Watch List** on the **Home** workspace.
-  sorts the content on this workspace.

  You can sort in ascending or descending order. Use the right and left arrows to move a selected sort item to the **Sort By** list. The lists are sorted in ascending order by default. To change the sort order, click the **Sort Direction** field for the item that you want to sort. Then click the order that you want the sort to use. Click **OK**.
-  changes the columns that are displayed in the window. The Manage Columns dialog box appears, as shown in the following display.

Display 3.5 Manage Columns Dialog Box



You can use the up and down arrows on the right side of the dialog box to change the order of the lists.

The previous dialog box shows that the **Gallery** workspace is displaying the Name, Description, Last Modified Date, Type, Owner, and Creation Date columns by default. To remove any of these columns from the window, select it and then use the arrows to move that column to the **Available columns** list.

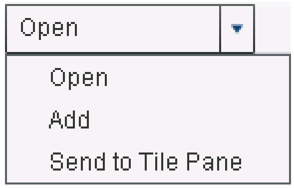
Note: This change persists from one session to the next.

Working with Folders

About Folders

Folders can contain zero or more galleries or albums as well as zero or more subfolders that can also contain galleries or albums. This structure enables you to store, manage, and locate your reports easily.

- For more information about galleries, see "Working with Galleries" on page 44.
- For more information about albums, see "Working with Albums" on page 59.

To view the contents of a folder, double-click that item in the table or use the arrow (▼) to expand or collapse the contents of the folder. You can also select the item and click the **Open** box on the workspace bar. The following list appears: 

From this list, select **Open**.

Create a Folder

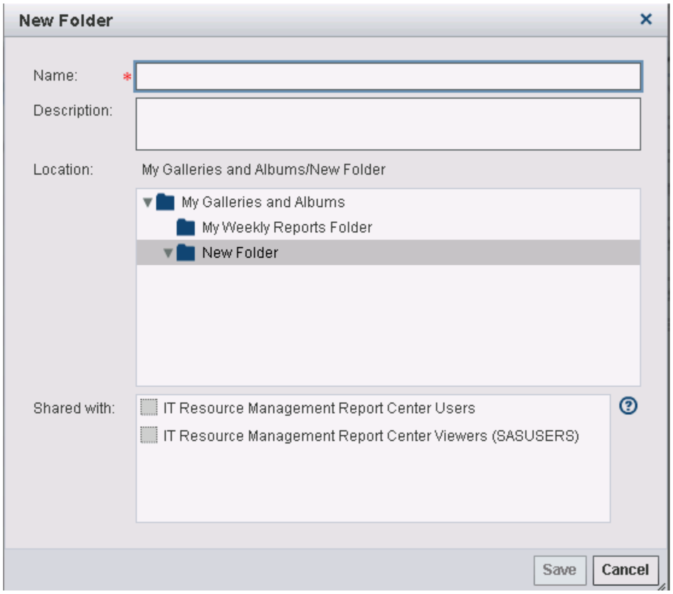
The `My Galleries and Albums` folder contains all of the folders and galleries that you create. When you create a folder, it is stored within the `My Galleries and Albums` folder.

To create a new folder, perform the following steps:

1 Click the down arrow that is next to the New Menu icon (). From the list of items that is displayed, select **NewFolder**.

The New Folder dialog box appears.

Display 3.6 *New Folder Dialog Box*



2 In the **Name** field, enter a unique name for the folder. The name of a folder can include no more than 60 characters.

3 (Optional) In the **Description** field, enter a description of the folder.

4 In the **Location** group box, select a folder where you want to store this new folder.

5 In the **Share with** box, check the groups that can access this new folder. The Share With section lists all groups that are members of the IT Resource Management: Report Center User role and the members of the SASUSERS group.

For example, you can create a group called “My ITRM Users”. If you assign the IT Resource Management: Report Center User role to it, this group also appears here.

Note: Only top-level folders can be shared with other users. Galleries, albums, and subfolders are shared based on the folders that they are stored in.

6 Click **Save** to create the folder or **Cancel** to close the dialog box.

View and Navigate Folders

Select a folder in the center pane and double-click it or select the **Open** box on the workspace bar. (Alternatively, you can click the down arrow next to the folder to display its contents.)

The center pane displays the following information about the subfolders, galleries, and albums that are contained in the folder that you selected:

- **Name** displays the name of the item.
- **Description** displays the descriptive text that is associated with this item.
- **Last Modified Date** displays the date on which the item was last changed.
- **Type** displays whether the object is a folder, a gallery, or an album. The icon to the left of each row also identifies the object.
- **Owner** displays the name of the user who created this item.
- **Creation Date** displays the date on which the item was created.

The column headings enable you to sort the objects by column. When you click a column heading in the grid, an up arrow (ascending) or down arrow (descending) icon appears. These arrows indicate whether the information in the columns is sorted by ascending or descending order. You can click the arrow in a column heading to change the sort order for that column.

Note: If an object does not have a value in one of the possible sort fields, then that object appears first in a list that is sorted in ascending order.

Edit a Folder

You can change the folder name, description, and location. For top-level folders, you can change the **Share with** list. The folders that you have permission to edit are based on your user ID. You can edit only those folders that you create.

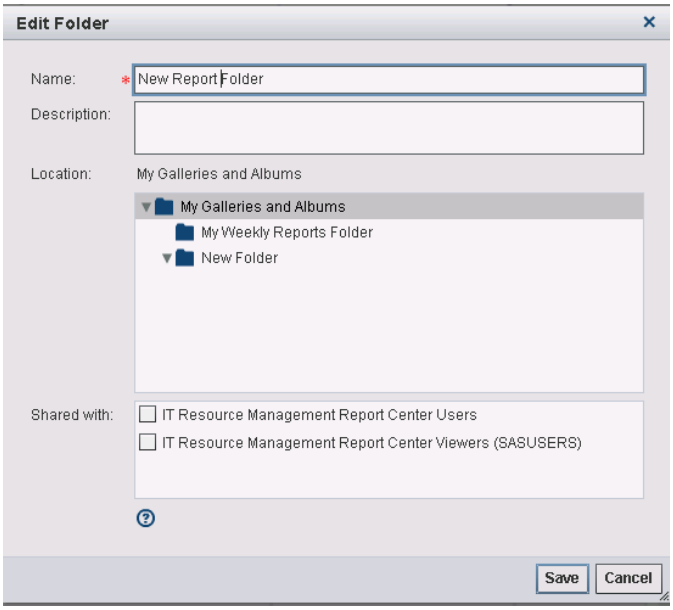
To edit a folder, perform the following steps:

1 Select the folder that you want to edit.

2 Click the Edit icon ().

The Edit Folder dialog box appears.

Display 3.7 *Edit Folder Dialog Box*



3 You can modify the values in the **Name** and **Description** fields as needed. The name of a folder can include no more than 60 characters.

4 Click **Save** to save your changes.

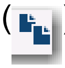
Note: Do not move a folder into one of its subfolders. If you attempt to do so, an error message appears.

Copy a Folder

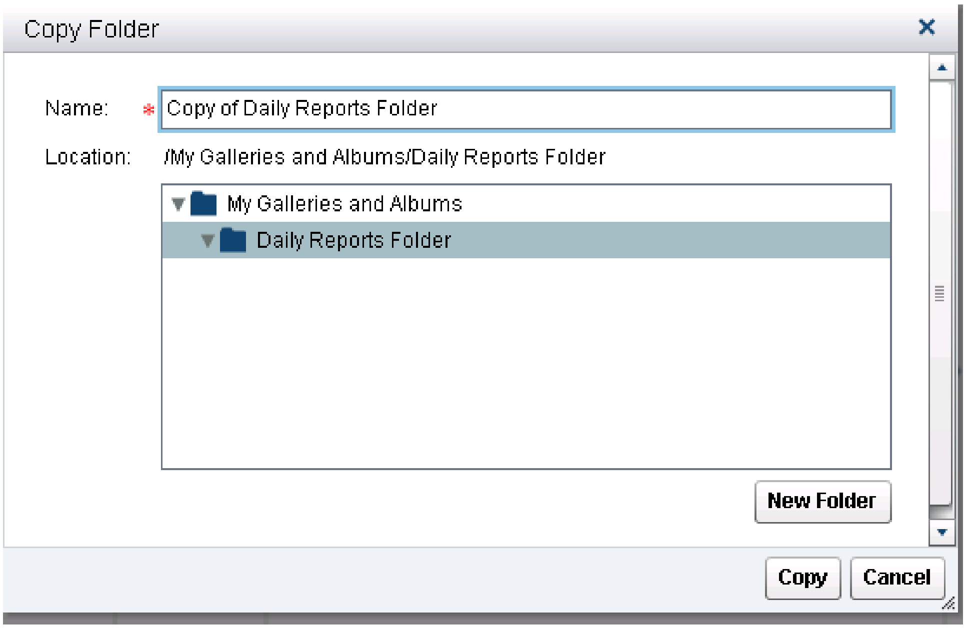
Folders can be copied from all available ITRM Report Center locations to your **`My Galleries and Albums`** folder or to any other folder under **`My Galleries and Albums`**.

To copy a folder, perform the following steps:

1 Select the folder that you want to copy.

2 Click the Copy icon (). The Copy Folder dialog box appears.

Display 3.8 Copy Folder Dialog Box



3 The **Name** field can be modified. The name of a folder can include no more than 60 characters.

4 Select a new location in which to store the copied folder.

You can also use the **New Folder** button to create a new folder for your copied folder. This action launches the New Folder dialog box that lets you create and define a new folder. When you are finished, you return to the Copy Folder dialog box.

Note: Do not copy a folder into one of its subfolders. If you attempt to do so, an error message appears.

5 Click **Copy** to copy the folder.

Note: The contents of gallery folders (that is, any other folders, galleries, and albums) are included in the copying operation when folders are copied. The **Shared with** property is not copied.

Delete a Folder

You can delete a folder to remove it and the galleries or albums that it contains from ITRM Report Center. However, this action does not delete the corresponding reports from the SAS Content Server.

Note: Members of the SASUSERS group and groups with the IT Resource Management: Report Center User role can delete only the folders that they created. Members of the IT Resource Management Report Center Administrators group can delete any folder.

To delete a folder, perform the following steps:

1 Select the folder that you want to delete.

2 Click the Delete icon ( ).

3 Click **Yes** to delete the selected folder.

Share a Folder

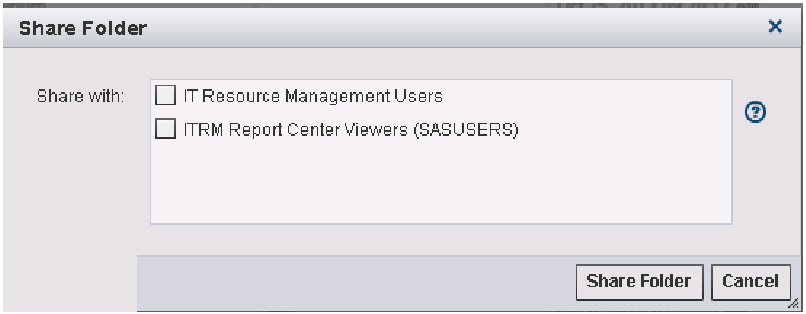
Members of the SASUSERS group and groups with the IT Resource Management: Report Center User role can share only the folders that they created. Members of the IT Resource Management: Administrators group can share any folder.

To share a folder with another user, perform the following steps:

1 Select the folder that you want to share.

2 Click the Share icon (). The Share Folder dialog box appears.

Display 3.9 *Share Folder Dialog Box*



3 Check the box next to any group that you want to share this folder with.

4 Click **Share Folder** to share the folder.

Note: If you do not want to share a folder with a particular group, deselect the check box for that group.

Note: Only top-level folders can be shared. Galleries, albums, and subfolders are shared based on the folders that they are stored in.

Working with Galleries

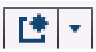
About Galleries

Galleries are collections or groups of reports that are generated by SAS IT Resource Management and placed in the SAS Content Server. Creating and working with galleries enables you to identify and group reports based on report properties. Grouping reports into manageable subsets enables you to view, evaluate, and analyze the performance and capacity of your IT infrastructure efficiently. For more information about the report properties that you can use as criteria for including reports in a gallery, see the chapters about report definitions and the ITRM Report Definition task in the *SAS IT Resource Management 3.6: Reporting Guide*. For more information about creating and using filters in the **Gallery** workspace, see "Filter Reports" on page 69.

Create a Gallery

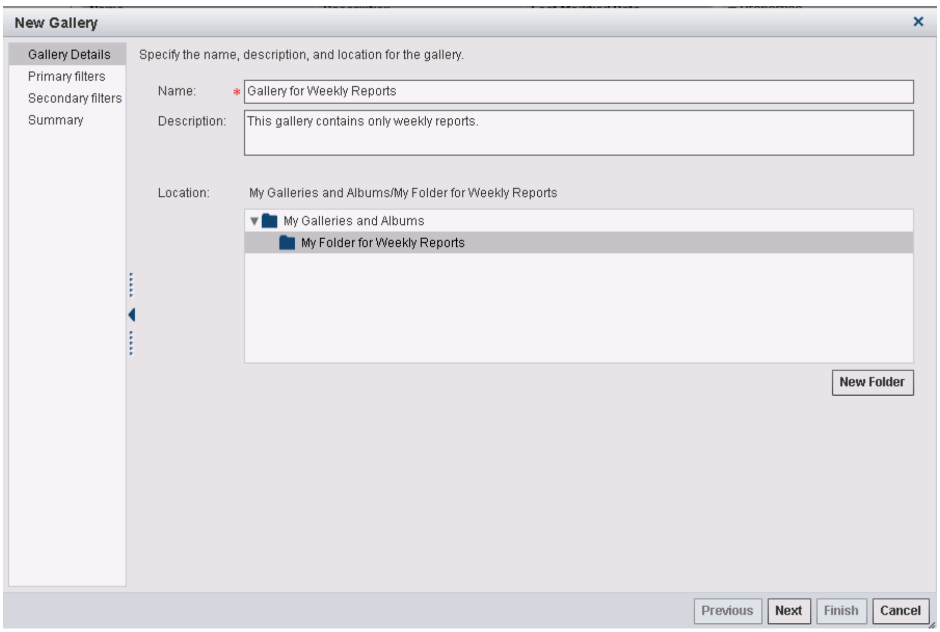
Gallery Details: Step 1 of 4

Members of groups with the IT Resource Management: Report Center User role and members of IT Resource Management Report Center Administrators groups can create galleries. To create a gallery, perform the following steps:

1 On the workspace bar of the **Gallery** workspace, click the arrow next to the Create a New Item icon (). From the list that appears, select **New Gallery**. The New Gallery wizard opens to guide you through the steps that create a new gallery.

2 On the **Gallery Details** page, specify the general information about the new gallery.

Display 3.10 Gallery Details Page of the Create Gallery Wizard



a In the **Name** field, enter a unique name for the gallery. Gallery names must be unique within a folder. The name of a gallery can include no more than 60 characters.

b (Optional) In the **Description** field, enter a description of the gallery.

c In the **Location** group box, select the folder where you want to store this new gallery. If you do not want to use one of the existing folders, then click the **New Folder** button. This action launches the New Folder dialog box that enables you to create and define a new folder. When you are finished, you are returned to the Create Gallery wizard.

Note: The contents of a folder have the same sharing status as their parent folder.

3 Click **Next** to specify the primary filters that you want use to subset the reports in the gallery. Continue to “Primary Filters: Step 2 of 4” on page 46.

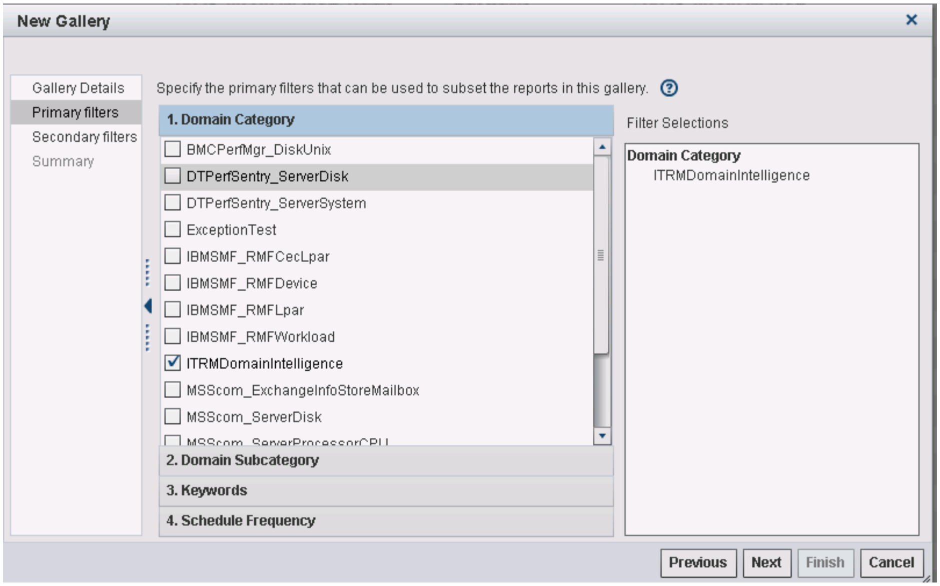
Primary Filters: Step 2 of 4

After you complete “Gallery Details: Step 1 of 4” on page 45, specify the primary filters.

1 On the **Primary filters** page, select the primary filters that designate the criteria for reports that make up the gallery. Filters limit the number of reports that are in the gallery. For example, you might choose to create a gallery that includes only reports that were defined to run weekly (Schedule Frequency) and that are available for a particular adapter data source (Domain Category) or keyword.

The following example shows the domain **ITRMDomainIntelligence** selected as a primary filter for a gallery. This domain is used to identify the sample reports that ITRM Report Center provides.

Display 3.11 *Primary Filters Page of the Create Gallery Wizard*



The values that appear in this list are based on the properties of the reports that are in the SAS Content Server at the time.

ITRM Report Center uses these report properties to identify, filter, and sort the reports. For more information about working with these report properties, see the Chapter 7, “Working with the ITRM Report Definition Task in SAS Enterprise Guide” in the *SAS IT Resource Management 3.6: Reporting Guide*.

Here are the four groups of primary filters that you can use to refine the set of reports in the gallery:

- **Domain Category** for the appropriate domain category that is associated with the adapter. Selecting a value for the domain is required.
- **Domain Subcategory** for the appropriate domain subcategory that is associated with the domain category.
- **Keywords** for other terms or variables by which you might filter the reports, such as “CPU.”

- **Schedule Frequency** for the time period on which the reports are run, such as daily, weekly, and monthly.

  Note: The Schedule Frequency filter, specified in the SAS Enterprise Guide ITRM Report Definition task, is a filter value that suggests when the corresponding report job should run. It does not schedule report jobs and is not necessarily indicative of the date properties of the corresponding reports.

To select primary filters, perform the following steps:

a Click the primary filter group to display the filters that are available. The primary filters that are available include only the variables that are present for at least one of the reports in the SAS Content Server. Check the box next to the filter that you want to select.

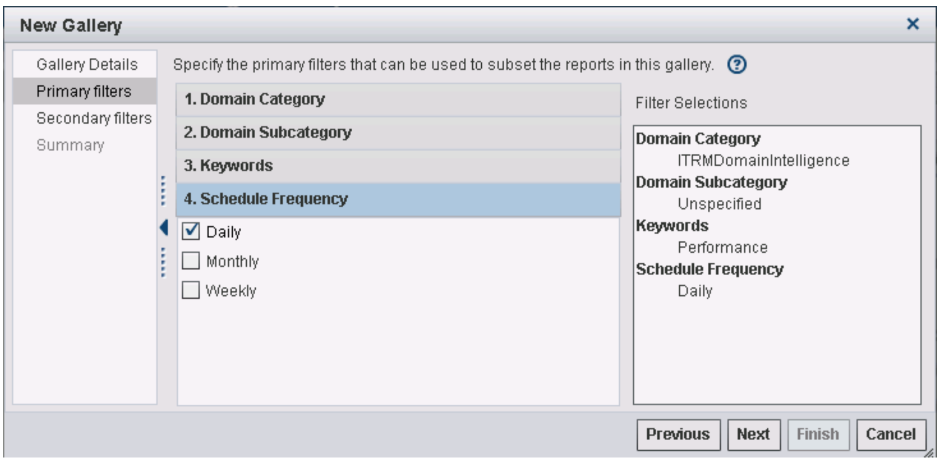
  Note: You must select a domain category.

b To deselect a filter, click the primary filter group. Click the box next to the filter that you want to remove. The checkmark is removed.

  Note: Selecting a filter restricts the size of the gallery so that only those reports that have properties that match that filter are included in the gallery.

Note: As shown in the following display, the primary filters that you selected appear in the right pane of the page.

Display 3.12 *Selected Primary Gallery Filters*



2 Click **Next** to specify the secondary filters that are used to further subset the reports into the gallery.

Note: By default, report limits for the primary and secondary filters are set to 100,000 and 3,000 respectively. By default, primary filters must reduce the number of reports to no more than 100,000 before you can continue to subset the reports further with secondary filters. Otherwise, an error message appears and you cannot continue. To continue, you must specify more primary filters to reduce the number of potential reports for the gallery. By default, secondary filters must reduce the number of reports to 3,000. Your ITRM Report Center administrator can configure these default report limits to different values for your organization if necessary. However, regardless of the values specified for the default report limits for the primary and secondary filters, ITRM Report Center permits no more than 5,000 reports in a single gallery.

> **TIP** To update the default report limits for the primary and secondary filters, use the SAS Administrative ID. For more information, see the “Reset the Maximum Number of Reports to Be Returned from the Create Gallery Filters “ topic in Chapter 10, “Administrative Tasks” in the *SAS IT Resource Management 3.6: Reporting Guide*.

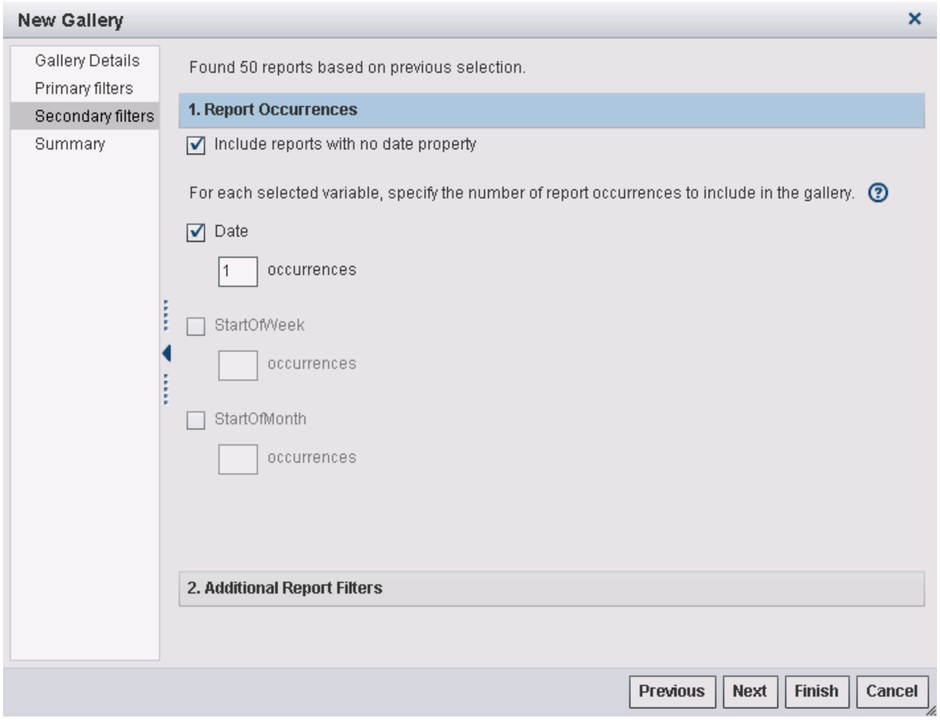
Continue to “Secondary Filters: Step 3 of 4” on page 49.

Secondary Filters: Step 3 of 4

After you complete “Primary Filters: Step 2 of 4” on page 46, specify the secondary filters.

1 On the **Secondary filters** page, select the secondary filters that designate additional criteria for reports that make up the gallery. Secondary filters enable you to further subset the reports that meet the primary filter criteria that you selected on the previous page.

Display 3.13 *Secondary Filters Page of the Create Gallery Wizard*



This page shows the number of SAS IT Resource Management reports that are in the SAS Content Server and meet the criteria that you specified with the primary filters on the previous page. You can select **Finish** to accept the default filters for **Date**, **StartOfWeek**, and **StartOfMonth**. Alternatively, you can continue to reduce the number of reports in the gallery by selecting secondary filters.

To select secondary filters, perform the following steps:

a Select whether you want to include reports with no date property in the gallery. Some reports might not have a Date, StartOfWeek, or StartOfMonth BY variable. If you want to include these reports in the gallery, then check the box next to the **Include reports with no date property** option.

b Check the box next to the date-based variable for which you want to specify the number of occurrences to include in the gallery.

  Reports can include the following date variables:

  - **Date** specifies that Date is in the BY variable of the report.

- **StartOfWeek** specifies that StartOfWeek is in the BY variable of the report.
- **StartOfMonth** specifies that StartOfMonth is in the BY variable of the report.

Note: These options for date variables are filters. However, if you want to exclude all reports with a date BY variable of Date, StartOfWeek, or StartOfMonth, then deselect the appropriate check box.

c In the **occurrences** field for the selected date-based variable, specify the maximum number of instances (1 to 99) of the date variable that you want to include in the gallery. If a report includes a corresponding date variable that is within this range, then the report is included in the gallery.

The range begins with the date of the most recent BY variable for the given time variable (**Date**, **StartOfWeek**, or **StartOfMonth**) and includes the next latest dates within the range.

For example, the following figure shows the date-based reports that are in a single gallery if occurrences are specified for all three date variables Date, StartOfWeek, and StartOfMonth. This figure uses the following conventions to represent reports:

- A black square (■) indicates that a report for the given date is available in the SAS Content Server and meets the primary filter criteria.
- A shaded cell indicates that the report is included in the gallery.

Figure 3.1 *Reports That Are Included in a Gallery Based on Occurrences*

4 **Occurrences** for **Date**

Reports with a Date in the BY Variables List	01JUN	02JUN	03JUN	04JUN	05JUN
Report A	■	■	■	■	■
Report B	■	■	■	■	
Report C	■	■	■		
Report D	■	■		■	
Report E	■			■	

2 **Occurrences** for **StartOfWeek**

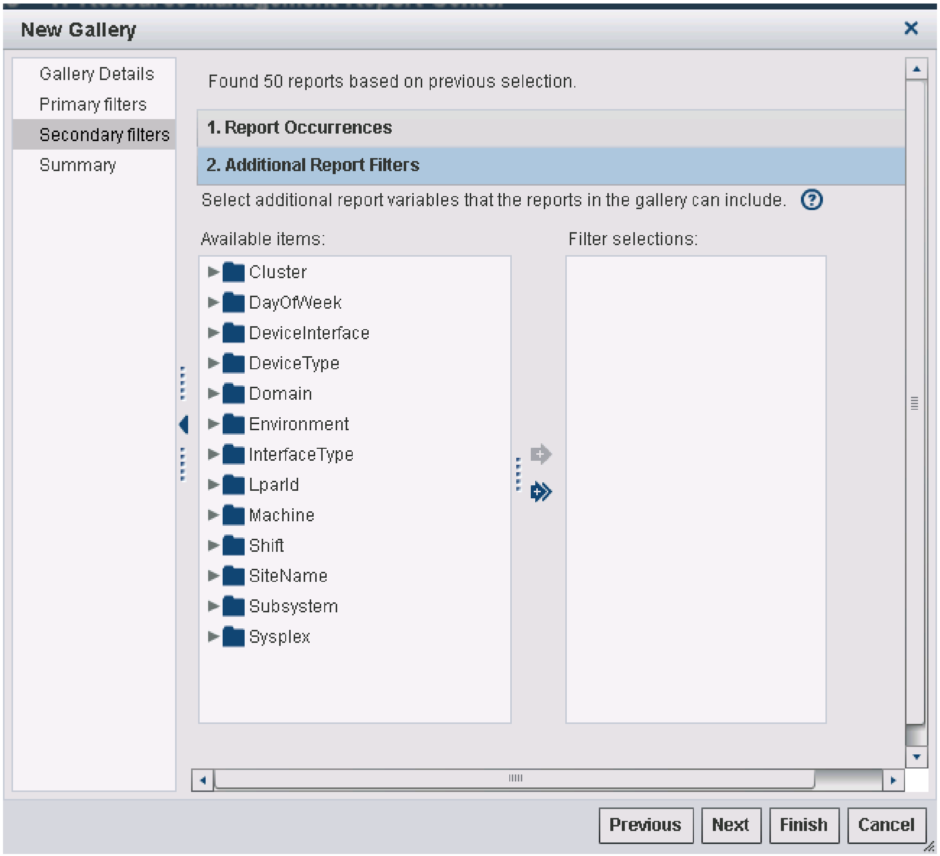
Reports with a StartOfWeek Date in the BY Variables List	03MAY	10MAY	17MAY	24MAY	31MAY
Report F	■	■			■
Report G	■		■		
Report H	■	■	■		
Report I	■	■			
Report J	■				

1 **Occurrence** for **StartOfMonth**

Reports with a StartOfMonth Date in the BY Variables List	01FEB	01MAR	01APR	01MAY	01JUN
Report K	■	■	■	■	■
Report L	■	■	■	■	

d Click **Additional Report Filters** to further subset the reports in the gallery. The following page appears.

Display 3.14 Additional Report Filters



These secondary filters are listed in the **Available items** box and are based on the primary filters that you selected on the previous page. Use the right arrow to move selected filter variables to the **Filter selections** box. To deselect a filter variable, select the filter in the **Filter selections** box and click the left arrow to move the filter back to the **Available items** box.

If you do not select an additional report variable, then the reports in the gallery can include any of the variables for that secondary filter category. If you select at least one variable, then the reports in the gallery can include only the variables that you selected from the secondary filter group.

Note: The gallery contains reports that have all of the selected BY variables. For example, in a domain category for VMware, the BY variables might be Host and Cluster. You might want to view only reports that contain a certain host within a certain cluster. To do so, when you create the gallery, on the **Secondary filters**

page, select the desired values for **Host** and for **Cluster** from the **Available items** box. Later, when you view the gallery, reports that contain the selected **Host** and **Cluster** values are returned.

2 Click **Next** to view a summary of your previous selections.

Note: If the gallery that is created contains reports in excess of the SecondaryReportCount value (a value set by the SAS Administrator), then this error message appears: <*nn*> reports are fetched which has exceeded the administrator's recommended limit of <*value-of-the-secondary-report-count*>. You can proceed and create this gallery understanding that only <*value-of-the-secondary-report-count*> reports will be included. Your SAS administrator can configure this report limit to a lower value for your organization if necessary. For more information, see Chapter 10, “Administrative Tasks” in the *SAS IT Resource Management 3.6: Reporting Guide*.

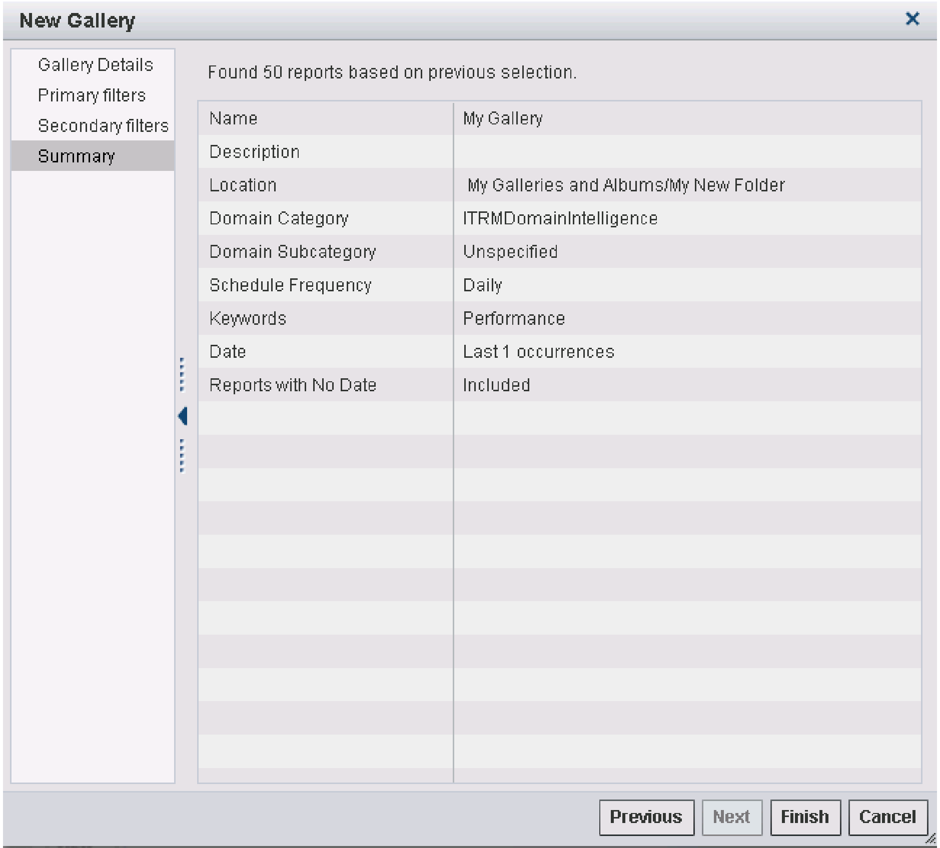
Continue to “Summary: Step 4 of 4” on page 54.

Summary: Step 4 of 4

After you complete “Secondary Filters: Step 3 of 4” on page 49, view the summary.

1 On the **Summary** page, review your previous selections and ensure that they reflect the results that you expected.

Display 3.15 *Summary Page of the Create Gallery Wizard*



This page provides the number of SAS IT Resource Management reports that are in the SAS Content Server and meet the criteria that you specified with the primary and secondary filters on the previous pages.

If the gallery includes more reports than you want, click **Previous** and modify your filter settings to further subset the reports.

2 Click **Finish** to create the gallery.

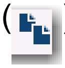
Copy a Gallery

To copy a gallery, perform the following steps:

1 In the left pane of the **Gallery** workspace, select the folder that contains the gallery that you want to copy from. You can select **My Galleries and Albums** or **Shared Galleries and Albums** or, for ITRM Report Center administrators, **Users' Galleries and Albums**.

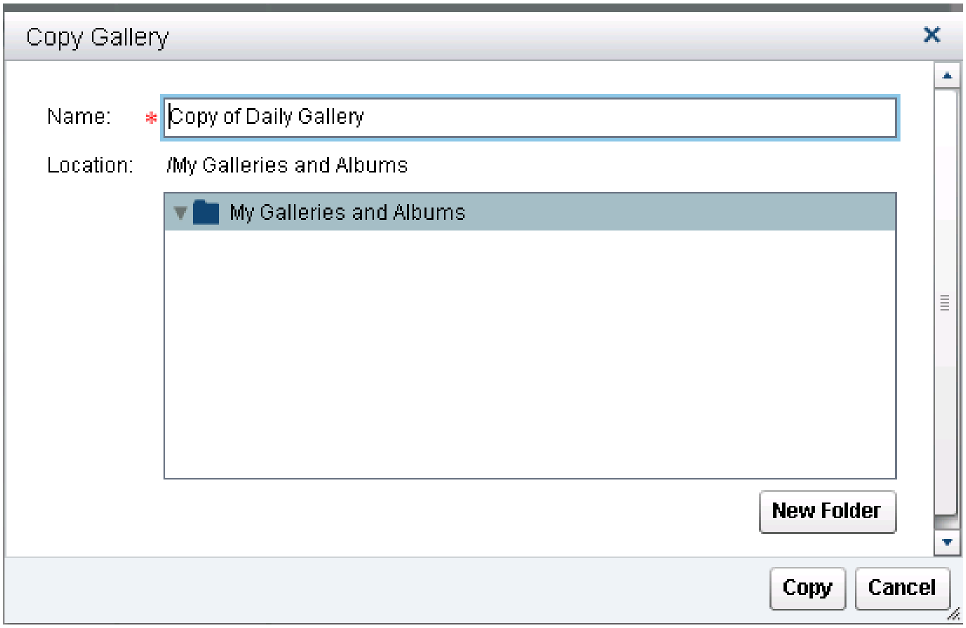
In the center pane of the **Gallery** workspace, select the gallery that you want to copy.

Note: You can select only one gallery at a time in this pane.

2 Click the Copy icon ().

The Copy Gallery dialog box appears.

Display 3.16 *Copy Gallery Dialog Box*



3 The **Name** field can be modified. The name of the gallery must be unique within a folder. It can include no more than 60 characters.

4 In the **Location** group box, select a folder where you want to copy this gallery. The copy inherits the sharing status of the folder where it is located.

You can also use the **New Folder** button to create a new folder for your copied gallery. This action launches the New Folder dialog box that lets you create and define a new folder. When you are finished, you return to the Copy Gallery dialog box.

5 Click **Copy** to create the copy of the gallery.

6 After the gallery is copied successfully, you are asked if you want to edit the copied gallery.

- Click **Yes** to open the Edit Gallery wizard. For information, see“Edit a Gallery” on page 58.

  Note: While you are copying a gallery from **Shared Galleries and Albums**, the Edit Gallery wizard might not appear. If so, navigate to the location of the copied gallery. Then, select the copied gallery and click the Edit icon ( ).

- Click **No** to return to the **Gallery** workspace.

If a gallery with the same name exists under the selected folder, then this message is displayed: `The location you specified already contains the object with this name. Specify a different location to copy.`

Delete a Gallery

You can delete a gallery to remove it from ITRM Report Center. Deleting a gallery does not delete the reports that it contains from the SAS Content Server.

Note: Members of groups that are members of the supplied IT Resource Management: Report Center User role can delete only the galleries that they created. Members of the supplied IT Resource Management Administrators group can delete any gallery.

To delete a gallery, perform the following steps:

1 In the center pane of the **Gallery** workspace, select the gallery that you want to delete.

Note: You can select only one gallery at a time in this pane.

2 Click the Delete icon ( ).

3 Click **Yes** to delete the gallery.

Edit a Gallery

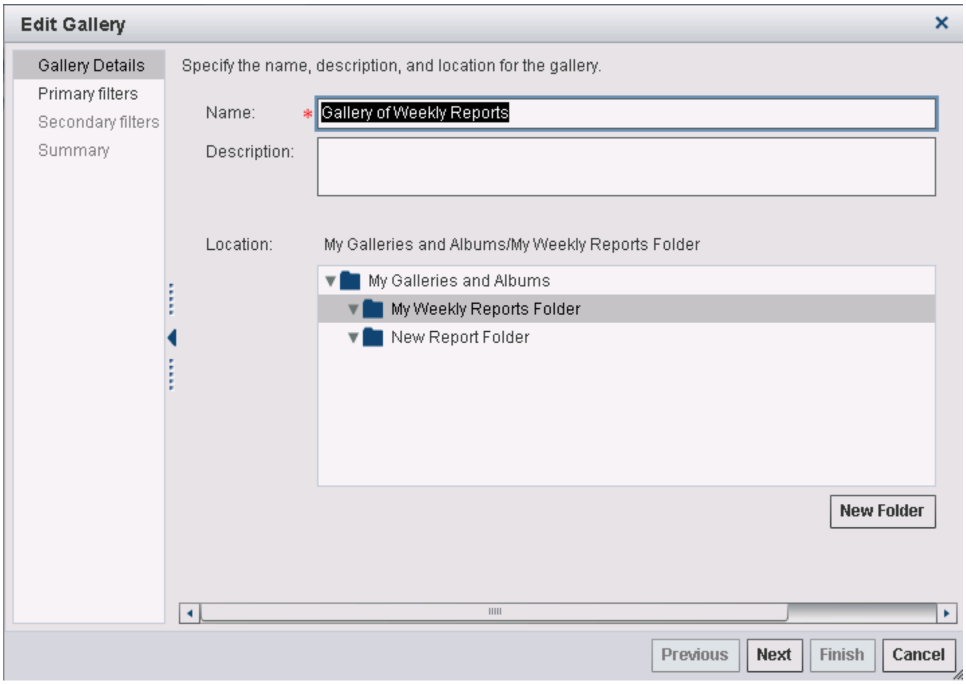
You can change the name, description, location, and filters of the galleries that you created.

To edit a gallery, perform the following steps:

1 In the left pane of the **Gallery** workspace, select the **My Galleries and Albums**.

2 In the center pane of the **Gallery** workspace, select the gallery that you want to edit. Click the Edit icon ( ). The first page of the Edit Gallery wizard appears.

Display 3.17 Edit Gallery Wizard



On this page, you can modify the name, description, and location of the gallery. You can also use the **New Folder** button to create a new folder for this gallery.

3 On the other pages of the wizard, you can modify the values in the **Primary Filters** and **Secondary Filters** pages as needed. For more information about how to complete the fields on these pages, see “Create a Gallery” on page 45.

Note: If you change the domain category on the **Primary Filters** page, then all other gallery filters are reset to default values. In this case, you have to explicitly re-specify your previous selections.

4 Click **Finish** to save the gallery changes.

Working with Albums

Overview of Working with Albums

Albums are containers for reports to which you want easy access. The reports in an album are those that are selected for inclusion when the user is viewing a report in the **Gallery** or **Resource** workspace. Albums can be thought of as point-and-click-galleries. Albums are not deleted unless you delete them manually.

Create an Album

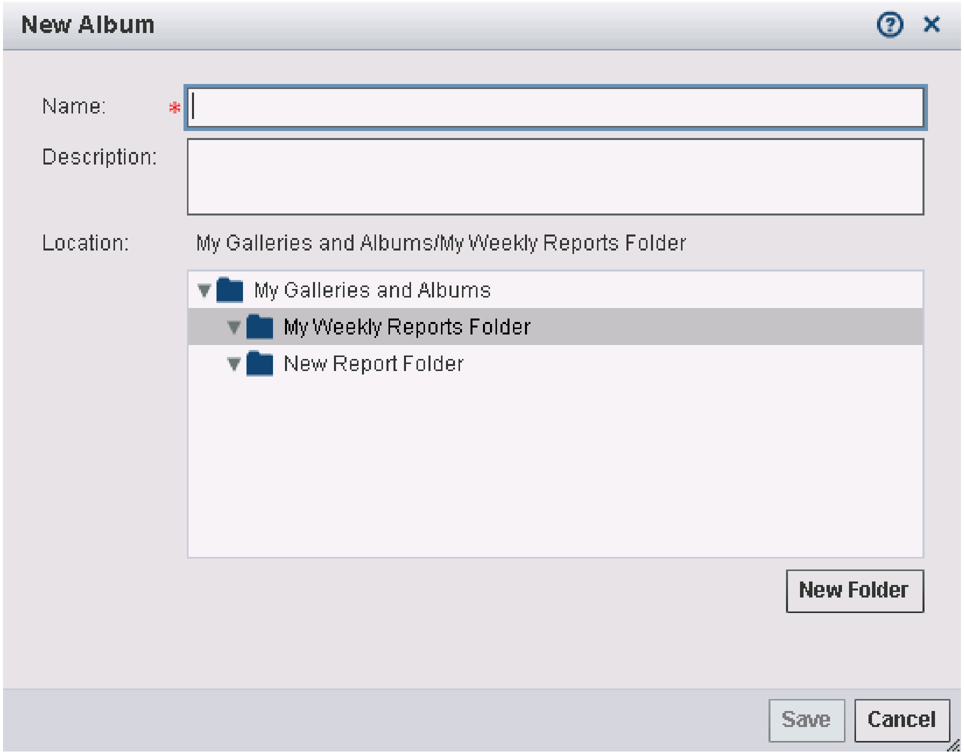
To create an album, perform the following steps:

1 On the workspace bar, click the **Create a New Item** icon (

)

2 Select **New Album**. The New Album dialog box appears.

Display 3.18 New Album Dialog Box



3 Enter a value in the **Name** field. The value in this field must be unique within its folder.

[Optional] Enter informative text in the **Description** box.

4 Click the down arrow ▼ to display the locations that are available to store your album in the SAS Content Server. Select the location where you want your album to be stored.

5 Click **New Folder** to open the New Folder dialog box that enables you to create and define a new folder. When you are finished, you are returned to the New Album dialog box.

6 Click **Save** to save your specifications and return to the **Gallery** workspace.

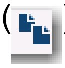
Copy an Album

To copy an album, perform the following steps:

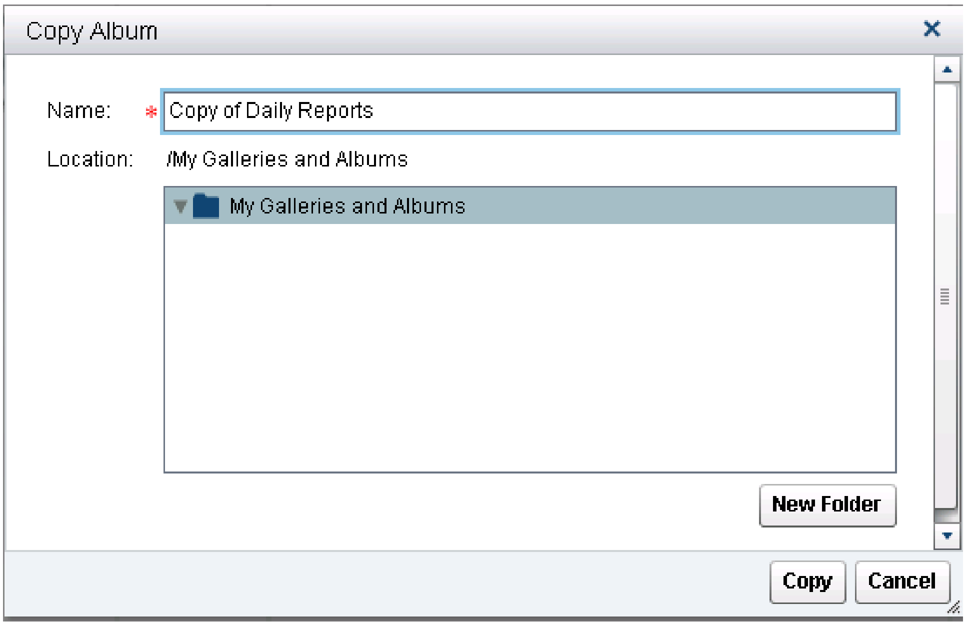
1 In the left pane of the **Gallery** workspace, select the folder that contains the album that you want to copy. You can select **`My Galleries and Albums`** or **`Shared Galleries and Albums`** or, for ITRM Report Center administrators, **`Users' Galleries and Albums`**.

2 In the center pane of the **Gallery** workspace, select the album that you want to copy.

Note: You can select only one album at a time in this pane.

Click the Copy icon (). The Copy Album dialog box appears.

Display 3.19 *Copy Album Dialog Box*



3 The **Name** field can be modified. The value in this field must be unique within its folder. It can include no more than 60 characters.

4 In the **Location** group box, select a folder where you want to copy this album. The copy inherits the sharing status of the folder where it is located.

   You can also use the **New Folder** button to create a new folder for your copied album. This action launches the New Folder dialog box that lets you create and define a new folder. When you are finished, you return to the Copy Album dialog box.

5 Click **Copy** to create the copy of the album. If an album with the same name exists under the selected folder, then this message is displayed: `The location you specified already contains the object with this name. Specify a different location to copy.`

Delete an Album

Members of the SASUSERS groups and that are members IT Resource Management: Report Center User role can delete the albums that they create. Members of the IT Resource Management Administrators group can delete any album.

To delete an album, perform the following steps:

1 Select **My Galleries and Albums** to display the list of your galleries and albums.

2 In the center pane, select the albums that you want to delete.

3 Click the Delete icon () on the workspace bar.

   This message is displayed: `Do you want to delete the selected items?` Click **Yes** to delete the items.

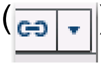
Copy Reports to an Album

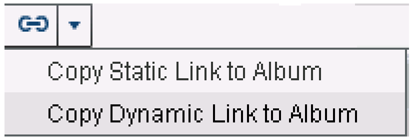
The option to copy a report to an album is available when you are viewing a report in the **Gallery** or **Resource** workspace. To copy reports to an album, perform the following steps:

1 When viewing reports in the **Gallery** or **Resource** workspace, identify the report that you want to copy to an album.

Note: When viewing a report in an album, you cannot link the report to another album.

2 Open the gallery that you want to copy a report from. Select the report that you want to copy.

3 On the workspace bar, click the Album icon ().

4 Use the down arrow to display this menu: 

5 Select one of the following types of copies:

- Select **Copy Static Link to Album** to copy the report to your album.
- Select **Copy Dynamic Link to Album** to copy the latest version of this report to your album.

  Note: If the report that you are copying was generated by a SAS IT Resource Management 3.3 or earlier job, a message appears that says that the report cannot be copied. (Reports that were generated by previous releases do not support this feature.)

You can copy the same report to an album as both a static link and a dynamic link. This feature enables you to compare the contents of the reports from the first day to the latest day. On the first day, the report that was copied as a static link is displayed. On the second day and every day thereafter until the static report expires, both the static link and the dynamic link are displayed.

Static reports are links to a particular report instance in the SAS Content Server. Dynamic reports are links to the latest version of a report. In both types of copies to an album, the links are removed when that instance of the report is removed from the SAS Content Server.

If a report is deleted and the cache is refreshed, the link to that report is no longer available and automatically removed from an album. If you open an album that does not contain any reports, then a message notes that there are no reports in this album.

Note: Reports are deleted when they pass their expiration date. In some cases, the administrator might delete reports manually. For more information, see the “Delete Reports from the SAS Content Server” topic in Chapter 10 “Administrative Tasks” chapter in the *SAS IT Resource Management 3.6: Reporting Guide*.

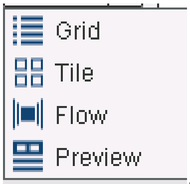
Working with Galleries and Albums in the Gallery Workspace

The following topics describe how to view, filter, and sort reports in the **Gallery** workspace. To work with the reports that are created by IT Resource Management, they must first be organized into a gallery or album. To open a gallery or album in the **Gallery** workspace, select that item from those that are available in `My Galleries and Albums` or `Shared Galleries and Albums`.

View Reports

The following display shows the workspace bar that is available when you are working in the **Gallery** workspace.

Display 3.20 Gallery Workspace Bar

The **Gallery** workspace provides four gallery views that enable you to view and sort the reports in different ways. Click the **Grid** button in the workspace bar to display the types of views that are available. Here is the list of views: 

. The four types of gallery views are displayed in the following list:

- The grid view displays the reports and their associated metadata in a tabular format. The columns in the table include additional information about the reports, such as the title, BY variables, and creation date.

  - **Type** shows an icon that defines the type of object that is being displayed. If the type of object is a performance report, the Performance Report ( ) icon is shown.

    If the type of object is an exception report, the Exception Report (icon is shown.

  - **Report Title** specifies the title of the report.

  - **By Variables** specifies resource BY variables that are in the report.

  - **Content Date** specifies the date BY variables that are in the report, such as Date, StartOfWeek, and StartOfMonth.

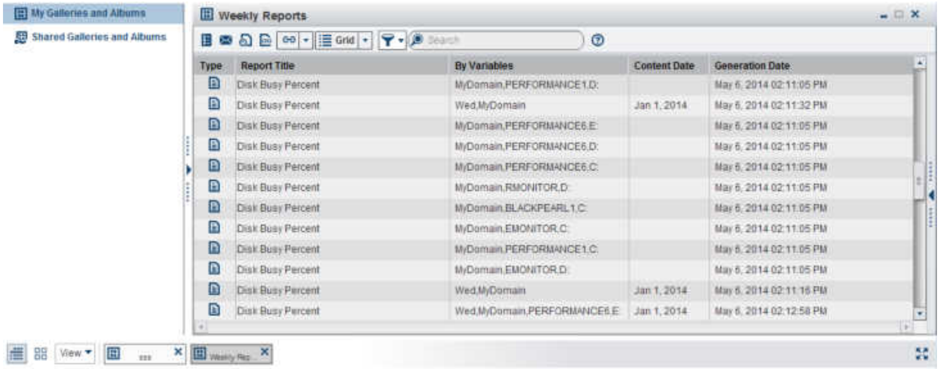
  - **Generation Date** specifies the date and time that the report was created.

    Note: The **Generation Date** that is displayed in the grid view shows the date that is based on the local time zone of the client. This date might differ from the date on which the report job was run if it was run in a different time zone from the client's time zone.

  You can select a column to sort reports based on that column or to adjust the width of the column in the table. You can quickly scan these report titles for similarities and double-click an individual report to view a large image of it in a separate browser window. This view is the default view.

  Note: Timestamps in the tabular view of ITRM Report Center contain different times than those in the actual reports if they are viewed in a different time zone from where the report jobs were run.

Display 3.21 *A Gallery in the Grid View*

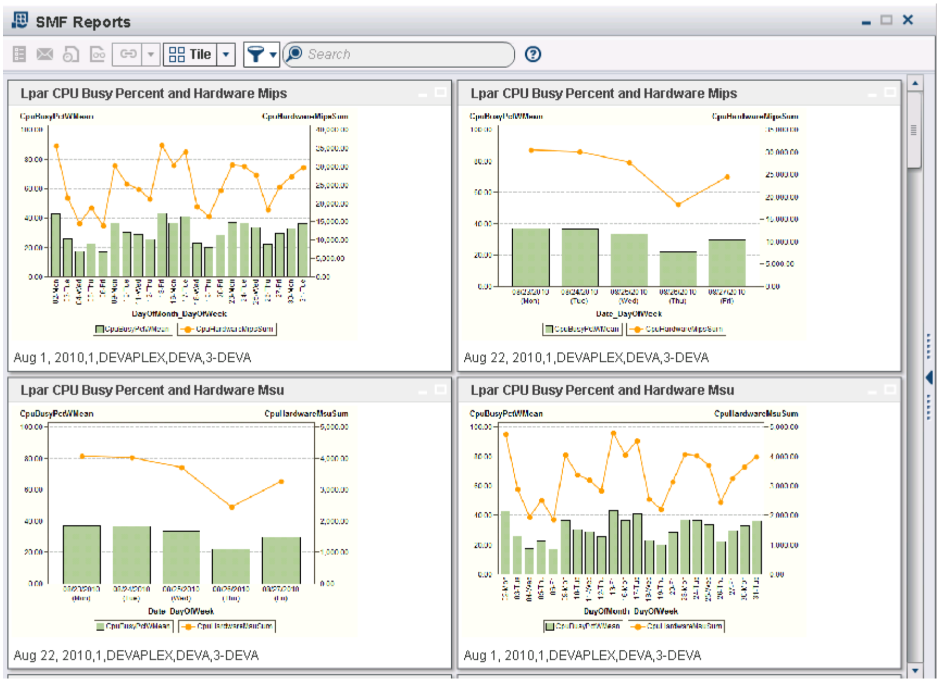


Double-click a report in the grid to open a large version of it in a separate browser window.

- The tile view displays thumbnail images. This view displays up to four thumbnails of reports at one time. Each tile includes the report title, the BY variables, and a small image of the report. You can double-click an individual report to view a large image of it in a separate browser window.

  ActiveX is supported only on Internet Explorer. Extensions or plug-ins are necessary when working with ActiveX content while using Chrome or Firefox browsers.

Display 3.22 *A Gallery in the Tile View*

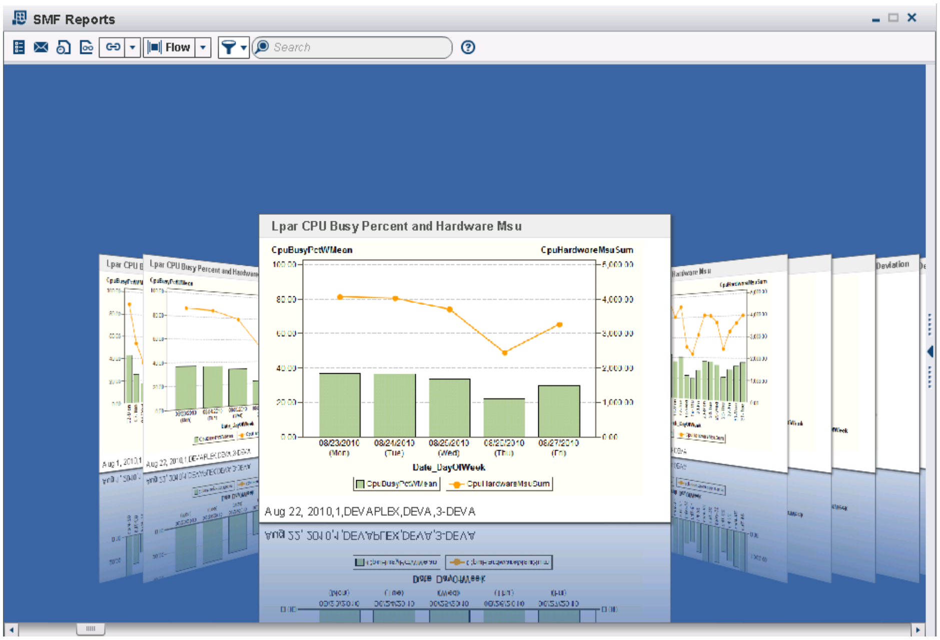


TIP You can use the vertical scroll bar to navigate through the entire set of reports in the gallery.

- The flow view displays a horizontal stack of reports at one time. Each report image includes the report title, the BY variables, and a small image of the report.

  This view displays the reports as moveable pages so that you can navigate through a sequence of reports that are stacked together. You can double-click an individual report to view a large image of it in a separate browser window.

Display 3.23 A Gallery of Reports in the Flow View

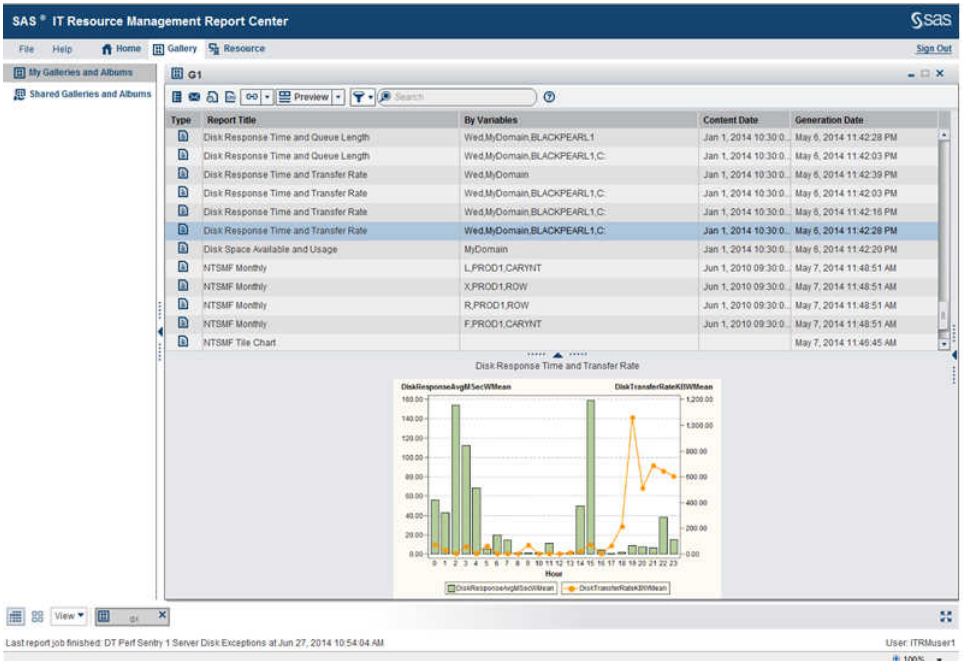


You can navigate between reports by clicking each page as if it were a page in a book. Here are the ways that you can navigate through the reports in the flow view:

- Click a report on the right to move that report into the center.
- Click a report on the left to move that report into the center.
- Double-click the report in the center to see a larger view of the report in a separate browser window.
- Use the horizontal scroll bar to page through reports.

- The **Preview** option displays a shortened list of the reports that are shown in the grid view and a Preview pane below. As shown in the following display, you can click a report in the grid area to see a thumbnail image in the preview area. Double-click a report in the grid area or the preview area to see a larger view of the report in a separate browser window.

Display 3.24 *Previewing Reports*



Filter Reports

You can use filters to subset the view of reports in a gallery by one or more criteria. This process reduces the number of reports that are shown in the gallery and album. Therefore, you can limit the display to the specific reports that meet your filter criteria.

The filter variables in the Filters pane are criteria that restrict the SAS IT Resource Management reports that are displayed when viewing a gallery in the **Gallery** workspace. When you select a filter variable within a group, you see only the reports that include the variable that you selected. However, if you do not select a variable within a given filter group, then the displayed reports can include any of the variables that are related to the filter group.

For example, a filter group named `Machine` might include four variables that correspond to four machines in your organization: DEVA, GOLDFINGER4, P0A2, and PERFORMANCE6. If you select the variable DEVA, then only the gallery reports for the DEVA machine appear.

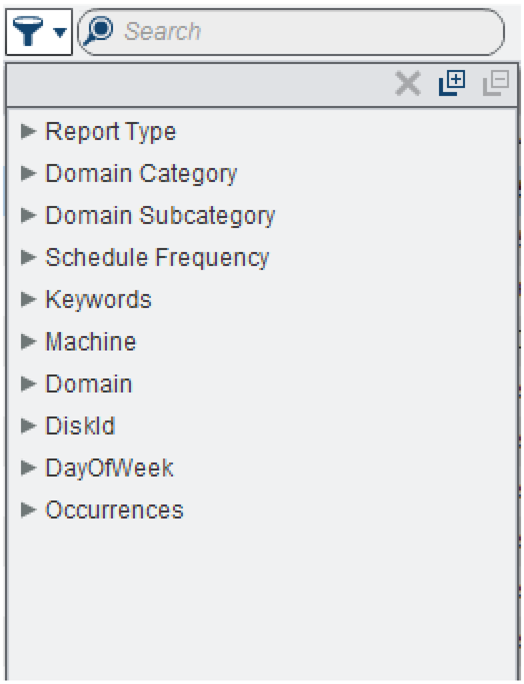
If you select multiple filter variables in a single filter group, then the Gallery pane displays only the reports that meet any of those selected criteria. If you select a filter variable in two different filter groups, then the Gallery pane displays only the reports that meet both criteria for the two distinct filter groups.

To filter the reports that you view in a gallery or an album, perform the following steps:

1 Open a gallery or album in the **Gallery** workspace. To do so, select the gallery that you want to work with and click **Open** on the workspace bar.

2 Click the arrow that is next to the Filter icon () on the workspace bar. The filter menu for the gallery appears:

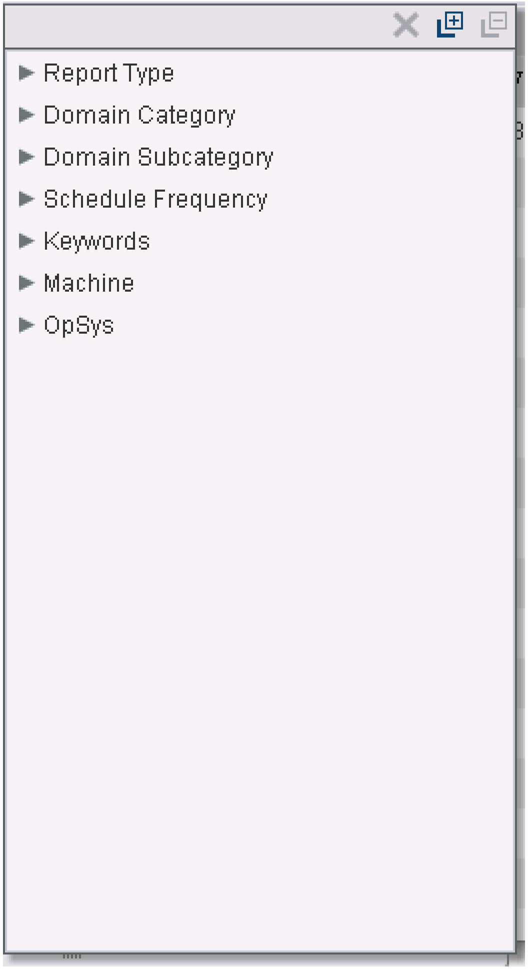
Display 3.25 *Filter Menu for a Sample Gallery*



Note: The list of filters includes the filters that you selected for this gallery. The list includes “Occurrences” if it was specified when the gallery was created.

The following display shows the filter menu for an album. (The filter list for albums does not include “Occurrences”.)

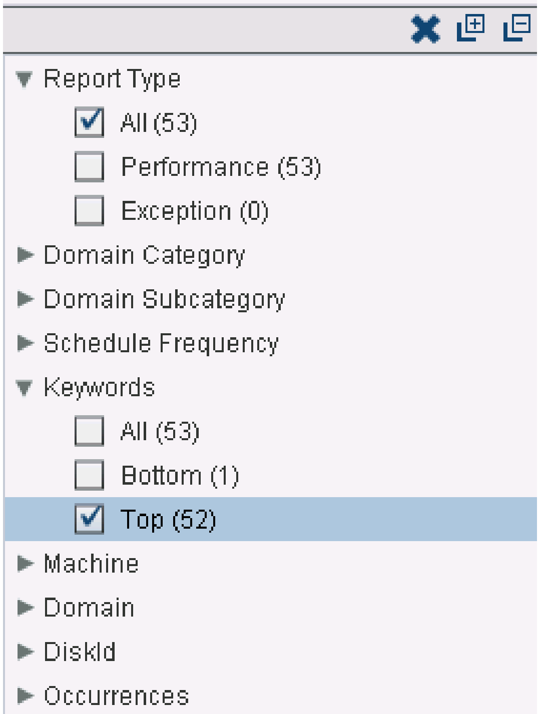
Display 3.26 *Filter Menu for a Sample Album*



3 Click the arrow next to the type of filter that you want to specify. The list of available values for a filter varies based on the BY variables that are in the reports in the open gallery. Thus, the filters that are available for selection might change each time a new gallery is selected for filtering.

4 Check the box next to the variable that you want to use to subset the reports in the gallery for viewing. For example, in the following display, all types of reports (performance reports and exception reports) are included in the subset if they contain the keyword “Top”.

Display 3.27 *Example of a Filter*



Note: Applying filters to a gallery or album does not modify the contents of the gallery or album. It only subsets the reports for viewing. Therefore, the applied filters last only for the current instance of the gallery or album. The next time you access the gallery or album, you will see all of its reports and you will be able to apply another set of filter criteria if necessary.

Sort Reports

The column headings of the preview and grid views enable you to sort the reports by column. The default order is alphanumeric ascending order by report title, BY variables, and report generation date.

When you click a column heading in the preview and grid views, an up arrow (ascending) or down arrow (descending) icon appears. These arrows indicate whether the information in the columns is sorted by ascending or descending order. For example, when the down arrow ( ) is displayed in the column heading, then the information in that column is sorted by descending order. You can click the arrow in a column heading to change the sort order for that column.

The sort order that you designate is not preserved the next time you access the gallery. The sort order that you designate in each of the grid and preview gallery views is preserved when viewing a gallery if you navigate to other views and return to them.

Note: If a report does not have a value in one of the possible sort fields, then that report appears first in a list that is sorted in ascending order.

Email Reports

ITRM Report Center enables you to email reports from the **Gallery** workspace. This enables you to share interesting or notable reports with colleagues for evaluation, analysis, or review.

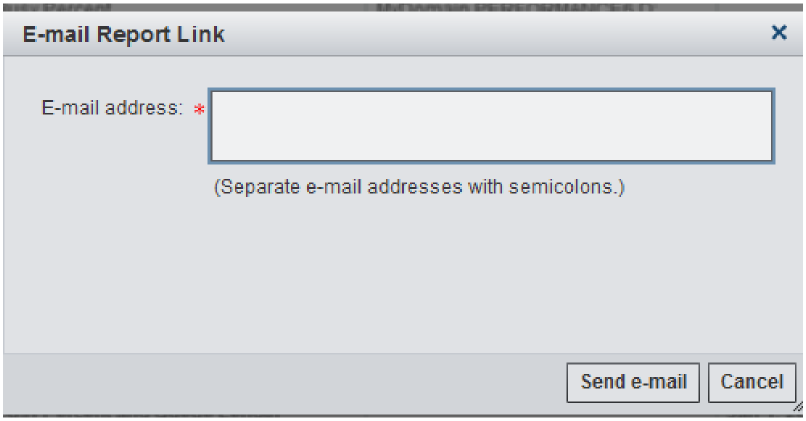
The emails that ITRM Report Center generates include links to the reports that are stored in the SAS Content Server repository. Therefore, viewing reports via email is successful only when sharing reports with other individuals within your enterprise who have network permissions to access the SAS Content Server.

To email a report, perform the following steps:

1 Select one or more reports that you want to email. (Reports can be selected from a gallery or an album.)

2 Click the Send Email icon (). The Email Report Link dialog box appears.

Display 3.28 *Email Report Link Dialog Box*

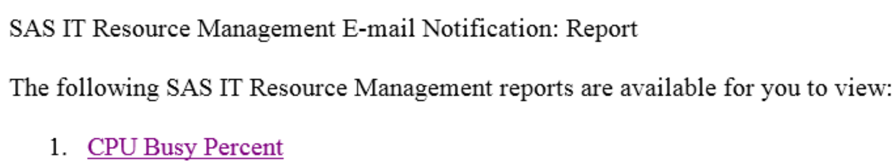


3 In the **Email address** field, enter the email addresses of the people to whom you are sending the reports. Separate multiple addresses with semi-colons.

4 Click **Send email**.

The following display shows an email message that was received by the addressee.

Display 3.29 *Contents of an Email Message*


SAS IT Resource Management E-mail Notification: Report

The following SAS IT Resource Management reports are available for you to view:

1. CPU Busy Percent

Clicking the underlined name of the report that is provided in the email message causes the report to open in your browser.

Reassign a Folder, Gallery, or Album

A gallery folder, gallery, or an album might need to be transferred from the original owner to a new owner. This type of reassignment might by necessary if an ITRM Report Center user has been replaced by a new person.

To reassign ITRM Report Center gallery folder, gallery, or album objects from one user to another, the IT Resource Management: Report Center Administrator and the new owner (the IT Resource Management: Report Center User) should perform the following steps:

1. The IT Resource Management: Report Center Administrator performs these tasks:
   a. Identify the objects that you want to transfer from the original owner to the new owner.
   b. Identify the group that the new owner belongs to.
   c. If the new owner has access to a shared gallery folder that contains the objects to be transferred, then proceed to Step 2.
   d. Create and share a gallery folder with the group that the new user belongs to.
   e. Copy the objects that you want to transfer into that gallery folder.
2. The new owner (the new IT Resource Management: Report Center User) performs these tasks:
   a. Copy each of the shared objects into a gallery folder that is owned by the new IT Resource Management: Report Center user.

      Note: Each object within a gallery folder must be copied individually.
   b. [Optional] Share the copied objects with other groups.

      Validate that the copied objects can be accessed successfully by the other groups. Make sure you can read the copied object. You might also want to make sure that you can edit the copied object.
3. The IT Resource Management: Report Center Administrator deletes the objects from the original owner of those objects.

Search a Folder, Gallery, or Album

To search within a folder, gallery, or album that you want to work with, perform the following steps:

1 On the **Gallery** workspace, locate the **Search: My Galleries and Albums** field.

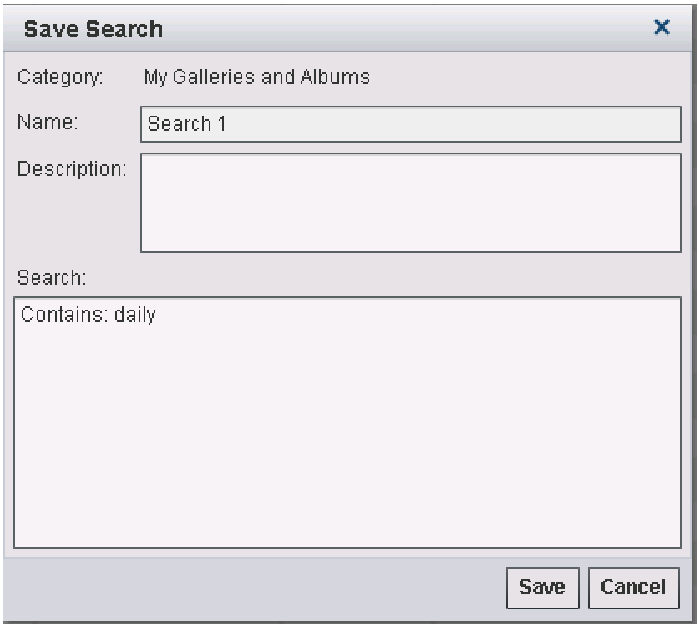
Display 3.30 *Search: My Galleries and Albums*

2 Enter the text that you want to locate in the **Search: My Galleries and Albums** field.

The reports that contain the text are displayed immediately.

3 (Optional) You can save your search criteria by clicking **Save Search**. The Save Search dialog box appears.

Display 3.31 *Save Search Dialog Box*

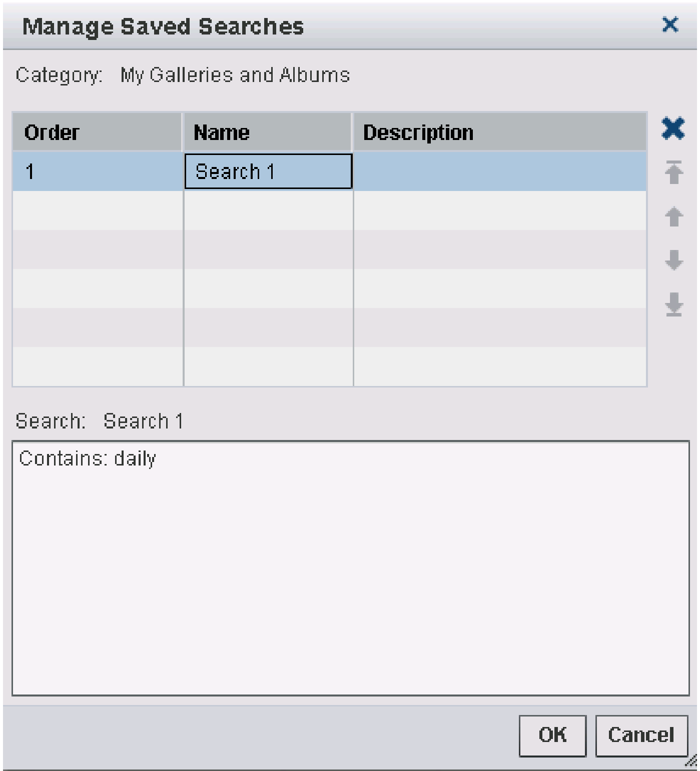


Note: Members of the IT Resource Management Report Center Administrators group can search **Users' Galleries and Albums** for folders, galleries, and albums that were created by other users.

Enter a value in the **Name** field. (Search*n* is the default name.) You can also enter a description of the search. Then click **Save**.

4 To manage your saved searches, click the down arrow next to **Save Search**. From the list that appears, select **Manage Saved Searches**. The Manage Saved Searches dialog box appears.

Display 3.32 *Manage Saved Searches Dialog Box*



Note: In the preceding display, daily reports were searched for.

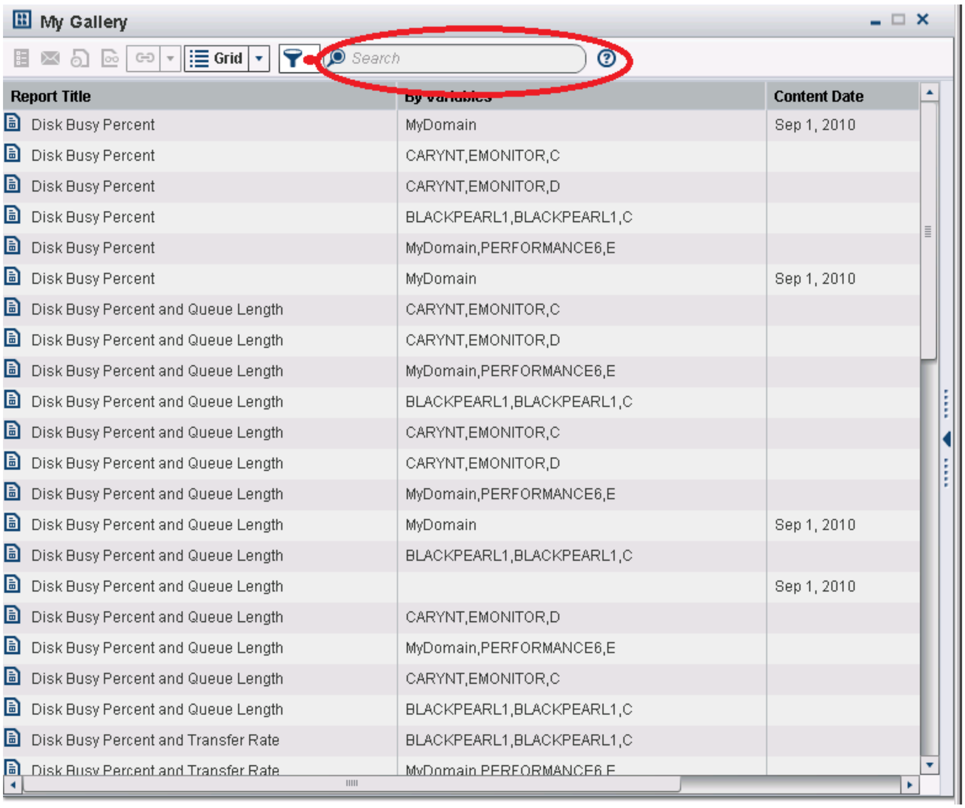
In this dialog box, you can change the order in which the saved searches are performed by using the up and down arrows. Click **OK** to return to the **Gallery** workspace.

To search for items within a folder, gallery, or album, perform the following steps:

1 On the **Gallery** workspace, select the album or gallery within which you want to search. Then click the **Open** box on the workspace bar. The contents of the album or gallery that you selected appears.

The following display shows the **Search** field outline in red for a gallery (called My Gallery).

Display 3.33 *Searching While Viewing a Gallery*



Report Title	By Variables	Content Date
Disk Busy Percent	MyDomain	Sep 1, 2010
Disk Busy Percent	CARYNT,EMONITOR,C	
Disk Busy Percent	CARYNT,EMONITOR,D	
Disk Busy Percent	BLACKPEARL1,BLACKPEARL1,C	
Disk Busy Percent	MyDomain,PERFORMANCE6,E	
Disk Busy Percent	MyDomain	Sep 1, 2010
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,C	
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,D	
Disk Busy Percent and Queue Length	MyDomain,PERFORMANCE6,E	
Disk Busy Percent and Queue Length	BLACKPEARL1,BLACKPEARL1,C	
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,C	
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,D	
Disk Busy Percent and Queue Length	MyDomain,PERFORMANCE6,E	
Disk Busy Percent and Queue Length	MyDomain	Sep 1, 2010
Disk Busy Percent and Queue Length	BLACKPEARL1,BLACKPEARL1,C	
Disk Busy Percent and Queue Length		Sep 1, 2010
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,D	
Disk Busy Percent and Queue Length	MyDomain,PERFORMANCE6,E	
Disk Busy Percent and Queue Length	CARYNT,EMONITOR,C	
Disk Busy Percent and Queue Length	BLACKPEARL1,BLACKPEARL1,C	
Disk Busy Percent and Transfer Rate	BLACKPEARL1,BLACKPEARL1,C	
Disk Busy Percent and Transfer Rate	MyDomain,PERFORMANCE6,E	

2 Enter the text that you want to locate in the **Search** field.

3 The reports that contain the text are displayed.

4

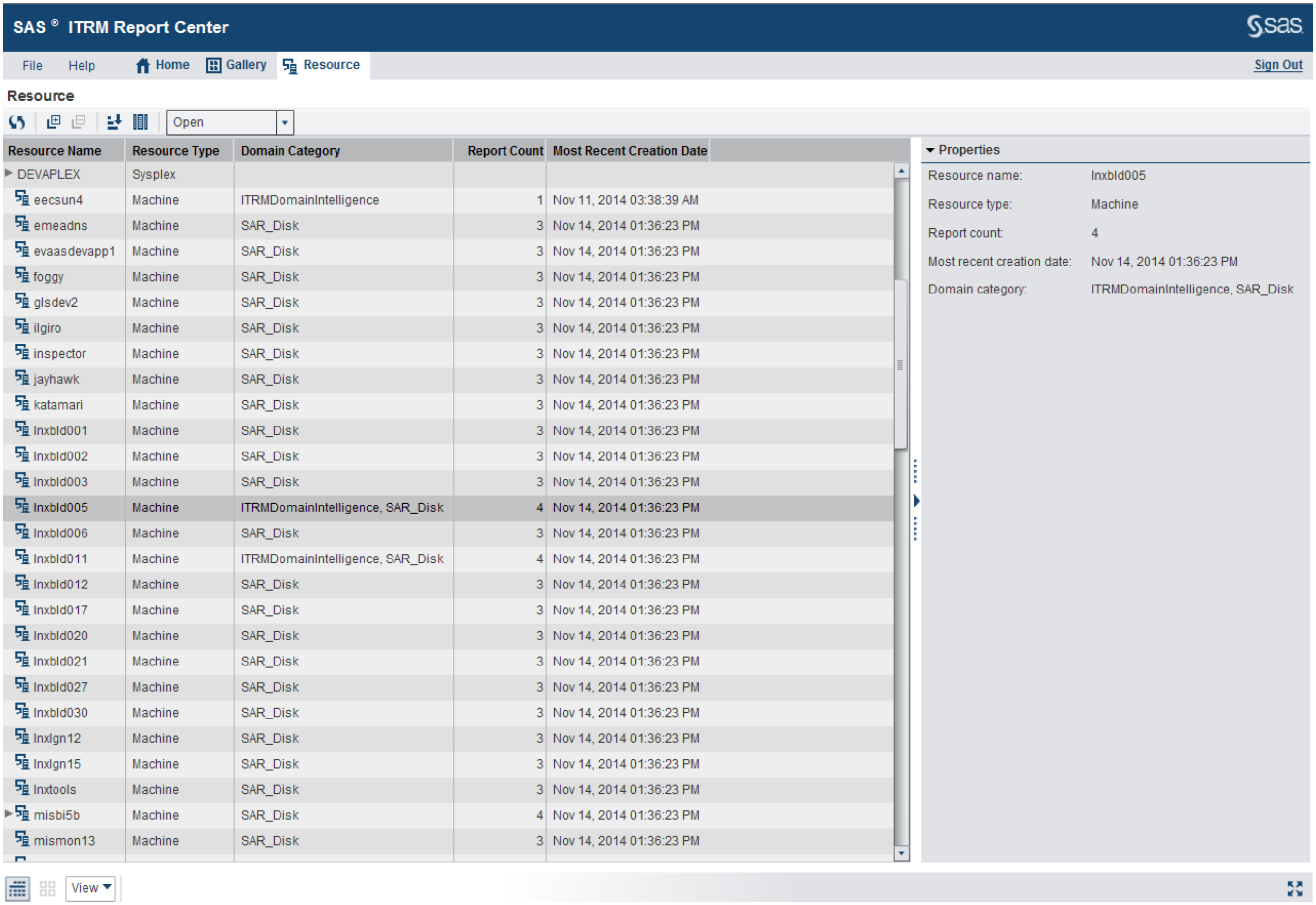
The Resource Workspace

Overview of the Resource Workspace

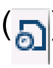
The **Resource** workspace presents a hierarchical view of the resources that are contained on the SAS Content Server. Click the **Resource** tab to display the **Resource** workspace.

Here is an example of the workspace:

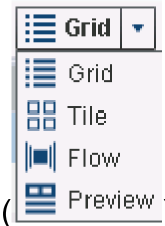
Figure 4.1 *Resource Workspace*



You can also navigate to the **Resource** workspace from the **Gallery** or **Home** workspaces.

- When viewing a report in the **Gallery** workspace, click the Show Related Reports icon () on the workspace bar.
- In the **Home** workspace, double-click the report.

Both of these methods cause the **Resource** workspace to appear. All the reports with the same set of resource BY variables are displayed as a gallery on the **Resource** workspace. If a resource belongs to multiple domains, those domains are listed in the Domain Category column and are separated by commas. (An example of multiple domains can be seen in the previous display of the **Resource** workspace.)

The **Resource** workspace displays the reports about the resources in grid format. To view the reports in another format, click the Report Views icon (

) on the workspace bar. Select the type of view that you want to see.

The **Resource** workspace is accessible only to users who sign in to ITRM Report Center as members of groups that are members of the IT Resource Management: Report Center User or the IT Resource Management Administrators group.

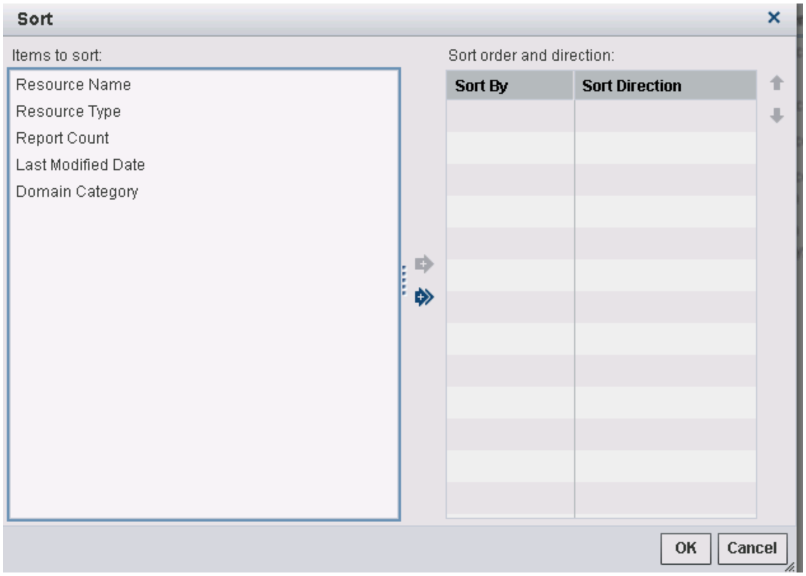
Note: For more information about how to access ITRM Report Center and the purposes of the roles, capabilities, and user groups that are associated with the application, see "Accessing ITRM Report Center" on page 10.

About the Resource Workspace

The main features of the **Resource** workspace are accessed from the workspace bar. The workspace bar of the **Resource** workspace contains the following icons:

-  updates the window with the latest information.
-  displays all the resources on this window.
-  lists only information that pertains to the first resource name. Reports with multiple resource names are hidden.
-  sorts the content on this workspace by **Resource Name** or **Resource Type**. The Sort dialog box appears as shown in the following display.

Display 4.1 *Sort Dialog Box*

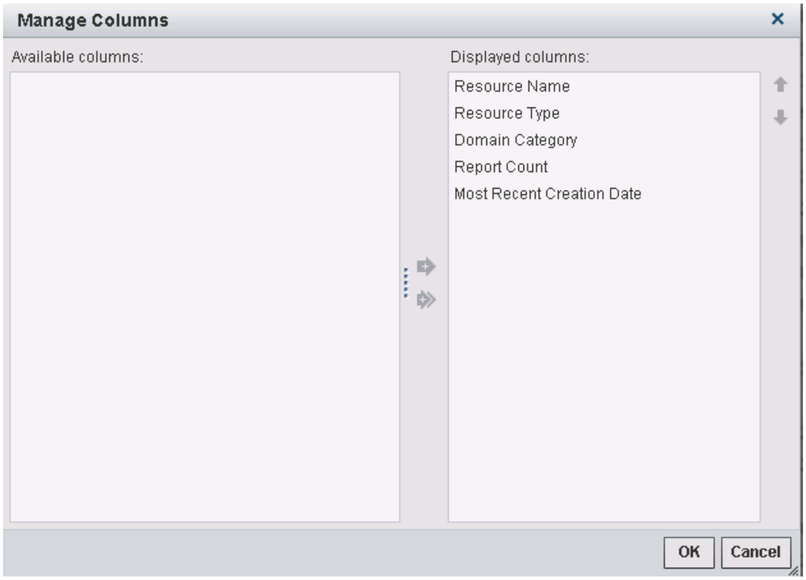


You can sort in ascending or descending order by **Resource Name**, **Resource Type**, **Resource Count**, **Last Modified Date**, or**Domain Category**. Use the right and left arrows to move a selected sort item to the Sort By column. The columns are sorted in ascending order by default. To change the sort order, click the **Sort Direction** field for the item that you want to sort. Then click the order that you want to sort by. Then click **OK**.

> **TIP** You can change the sort order of the selected items by using the up and down arrows on the right side of the column.

-  changes the information that is displayed on the window. The Manage Columns dialog box appears, as shown in the following display.

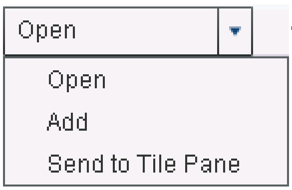
Display 4.2 *Manage Columns Dialog Box*



The previous dialog box shows that the **Resource** workspace is displaying the Resource Name, Resource Type, Domain Category, Report Count, and Most Recent Creation Date by default.

To remove any of these columns from the workspace, select it and then use the arrows to move that column to the **Available columns** list.

Note: This change persists from one session to the next.

- The following display shows the **Open** menu. 

.

  It displays these options for a selected resource:

  - Click **Open** to display the reports for that resource. The reports appear as a gallery using the default grid view.

    By default, ITRM Report Center limits the number of reports that can be displayed in a gallery to 3,000. When the number of reports exceeds 3,000, a message is displayed and the reports that exceed that limit are omitted from the display. The default value for the number of reports that can be displayed in a gallery is stored in the **SecondaryReportCount** parameter. The default value of this parameter (3,000) can be changed by a SAS administrator. However, regardless of the value specified for the **SecondaryReportCount** parameter, ITRM Report Center permits no more than 5,000 reports in a single gallery.

TIP To view or change the default report limits for the secondary filters, use the SAS Administrative ID. For more information, see the “Reset the Maximum Number of Reports to Be Returned from the Create Gallery Filters “ topic in Chapter 10, “Administrative Tasks” in the *SAS IT Resource Management 3.6: Reporting Guide*.

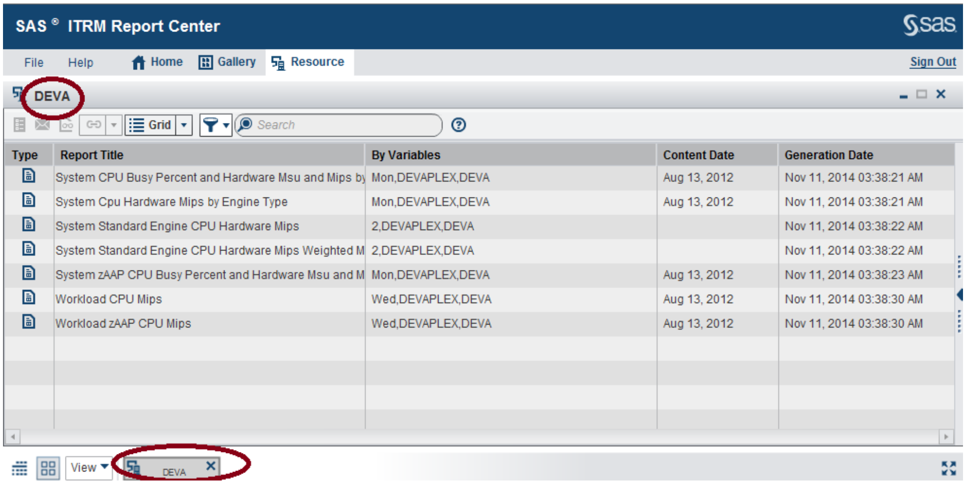
Reports that pertain to a selected resource might exist in multiple root locations. If a user belongs to several root locations, all the reports (across all the root locations to which the user belongs) are displayed.

Reports with partially matching nodes are merged when displayed. For example, suppose there are two sets of reports. One set of reports has only one variable. The other set has two variables. (One of these variables matches the variable of the first set of reports.) When displayed, the two resource hierarchies are merged into one hierarchy. That is, both sets of reports are displayed under the variable that was common to both sets of reports.

Note: If the number of reports seems incorrect, refresh the cache for the root location. This can be done by a SAS administrator on the **Administration** workspace.

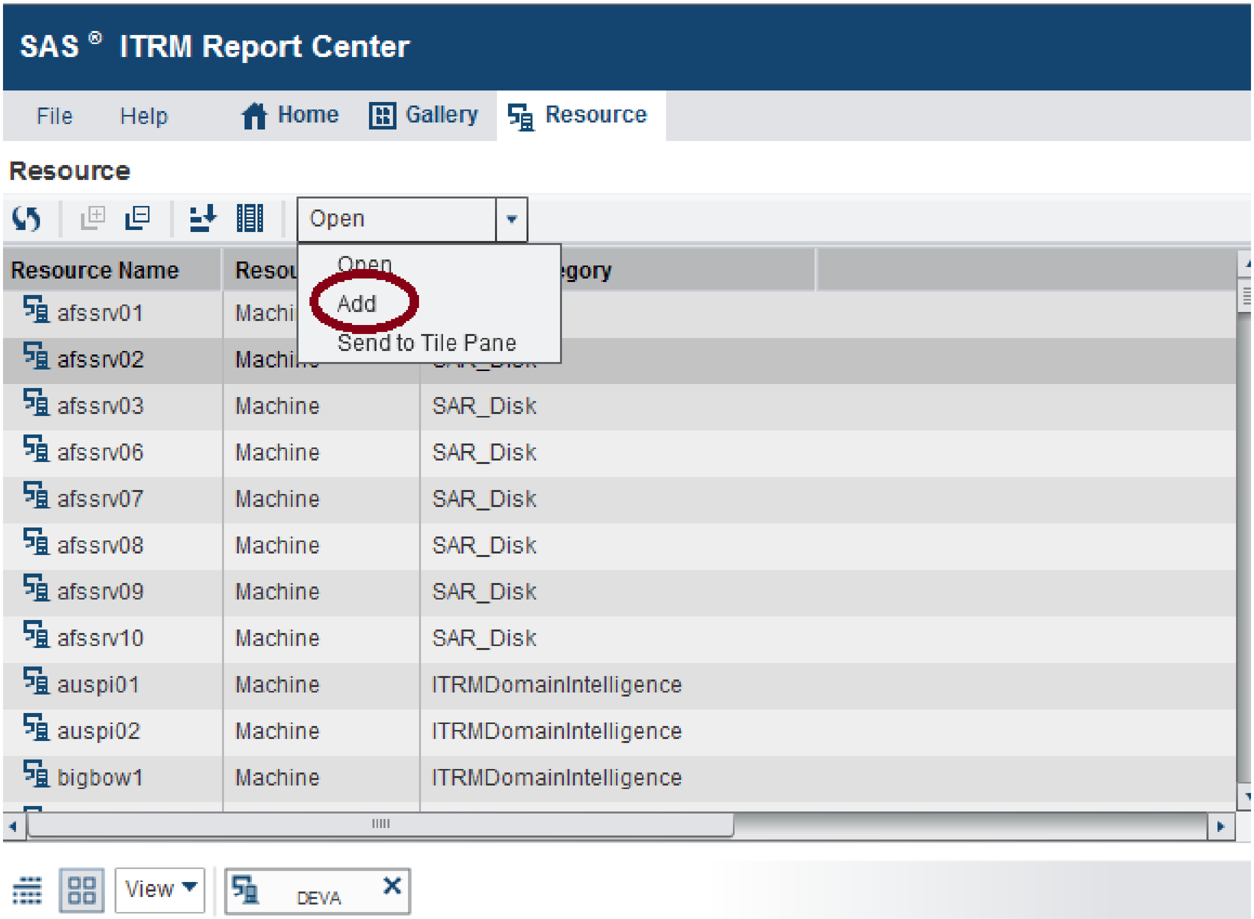
In the following display, the DEVA resource was selected on the workspace that was displayed in the “Overview of the Resource Workspace” on page 79.

Display 4.3 *Example of the List of Reports by Resource Action*



Note: The name of the resource (in this example, “**DEVA**”) appears in the tray at the bottom of the workspace. It also appears at the top of the page above the workspace bar.

- Click **Add** to open the item in the current layout.

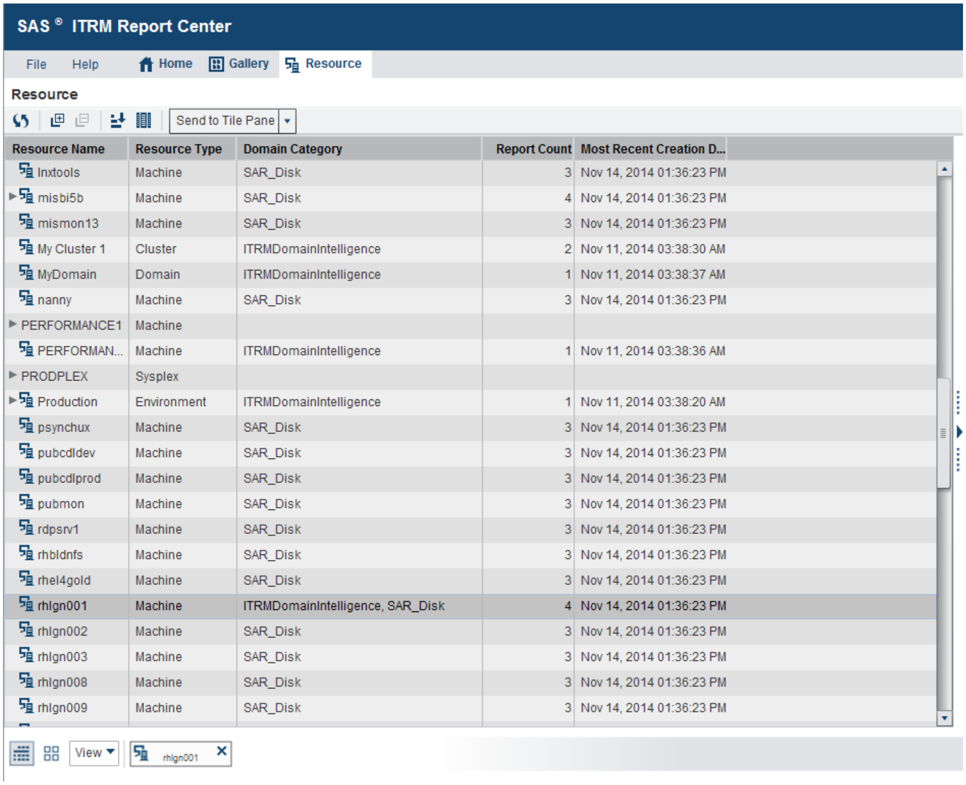


Note: This option appears only if an object is in the tile view in the tray at the bottom of the window.

- Click **Send to Tile Pane** to add the selected resource to the location at the bottom of the page.

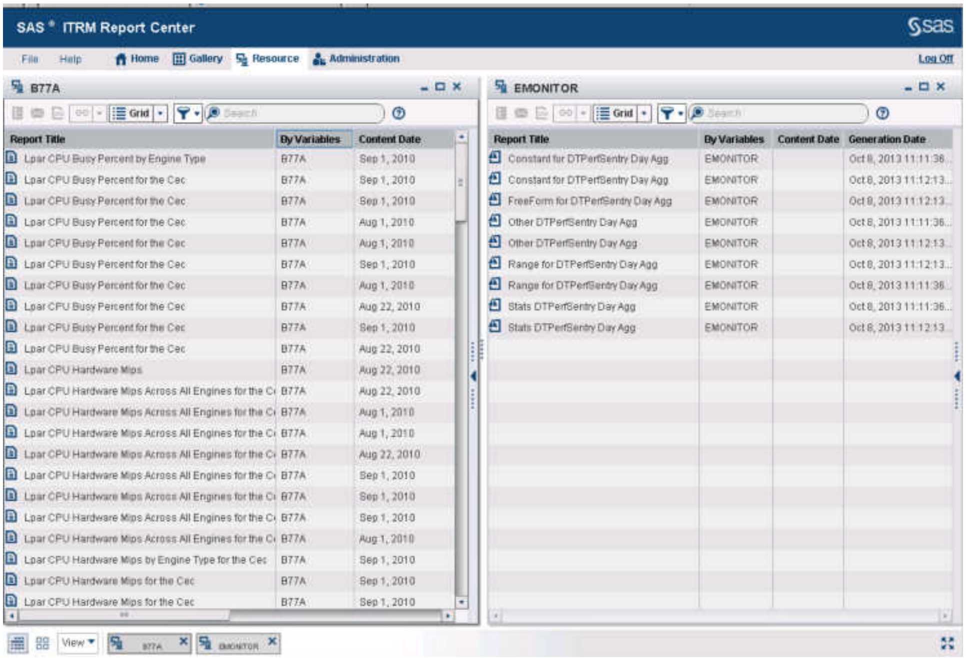
  For example, in the following display, the selected resource is **rhlgn001**.

Display 4.4 *Example of the Send to Tile Pane Action*



Using the **Send to Tile Pane** feature makes it easier to compare the resources. Clicking the tiles (one after another) causes them to display as a tile gallery in the same workspace, as shown in the following display. Alternatively, select **View** ► **Show All Items** to view the resources as a tile gallery.

Display 4.5 Comparison of Two Resource Lists in the Same Workspace



Note: In the previous display, the resource groups B77A and EMONITOR are compared. Any number of resource groups can be displayed as tiles at the same time in the workspace. However, legibility of the images might be impaired if more than nine resource groups are included in the view.

The following display shows the tray at the bottom of the **Resource** workspace.

Display 4.6 Resource Workspace Tray

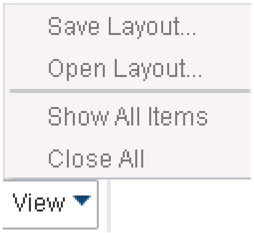
It contains these objects:

- 

  Click the View Object List icon to display all the objects in the **Resource** workspace. This view shows the Domain Category column. (This icon toggles with the View Layout icon. Click the View Layout icon to eliminate the Domain Category column from the display.)

-

  Click the View Layout icon to bring focus to opened tile galleries. (This icon toggles with the View Object List icon.)

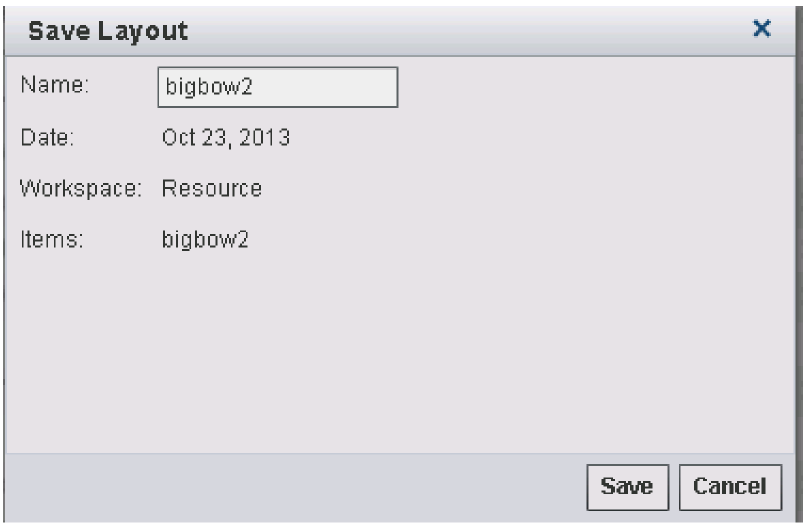
- 

  Click the **View** button to display these options:

  - **Save Layout**

    Select this item to open the Save Layout dialog box.

    Display 4.7 *Save Layout Dialog Box*

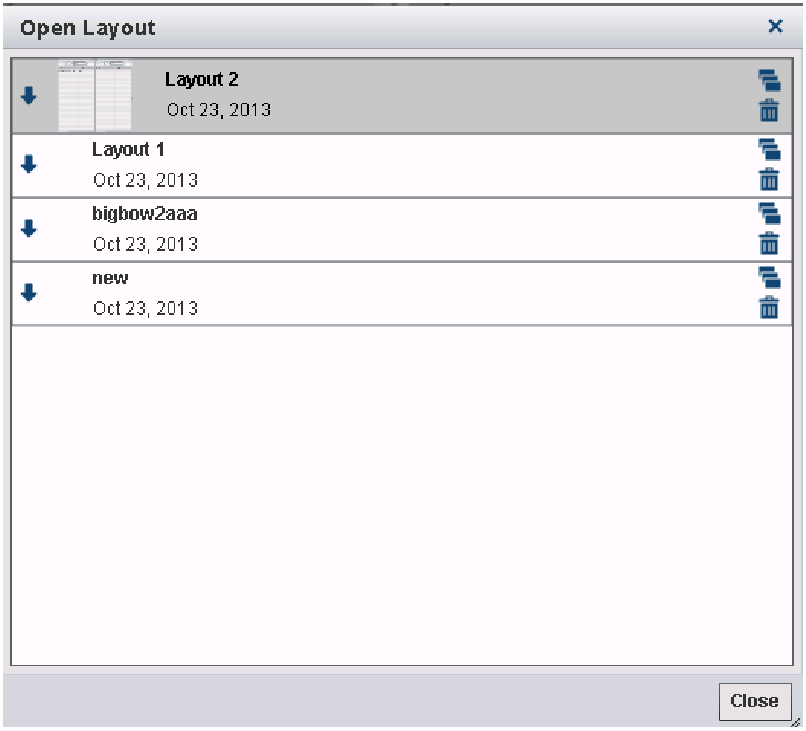
    

    This dialog box displays identifying information about the layout: name, date of creation, workspace, and items contained in the layout. You can change the **Name** of the layout. The **Name** field can contain any type and number of characters. Click **Save** to save the layout and return to the workspace view.

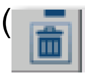
  - **Open Layout**

Select this item to open the Open Layout dialog box.

Display 4.8 *Open Layout Dialog Box*



Click the Open Layout icon () to display the selected layout.

Click the Delete Layout icon () to remove the selected layout.

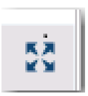
Click the down arrow next to the layout to show the details of that layout.

- **Show All Items**

  Select this item to display all the tiles that are shown in the tray of the **Resource** workspace. The resources are displayed in the form of a gallery.

- **Close All**

  Select this item to remove all tiles from the tray of the **Resource** workspace.

- 

Click the Maximize View icon to enlarge the view by removing the banner and the status bar. (This icon toggles to maximize and normalize the view.)

- The name or ID of the user appears next to the **User** field.

Several features that are described for the **Gallery** workspace are also available for use in the **Resource** workspace. The following features are available for both workspaces:

- "Search a Folder, Gallery, or Album" on page 76
- "Email Reports" on page 73
- "Sort Reports" on page 72
- "Filter Reports" on page 69

Similarly, workspace navigation options that are described for the **Resource** workspace are also available for use in the **Gallery** workspace. These features are the **Open**, Add, **Send to Tile Pane**, and **Workspace Tray** that are described in the "About the Resource Workspace" topic in this chapter. For more information, see "About the Resource Workspace" on page 81.

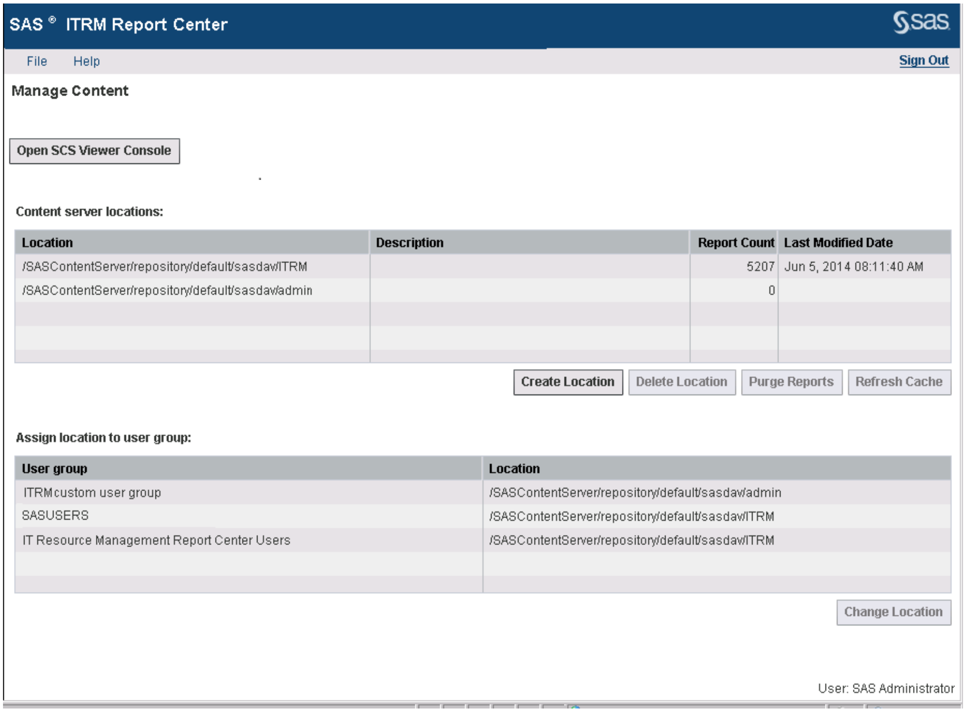
5

The Administration Workspace

Overview of the Administration Workspace

The **Administration** workspace is accessible to users who sign in to SAS IT Resource Management Report Center as members of the IT Resource Management Report Center Administrators group. Here is an example of the workspace.

Display 5.1 Administration Workspace



Note: For more information about how to access ITRM Report Center and the purposes of the roles, capabilities, and user groups that are associated with the application, see "Accessing ITRM Report Center" on page 10

About the Administration Workspace

Administration Workspace Tasks

The IT Resource Management administrator has access to all workspaces and functions of ITRM Report Center, including all locations of the SAS Content Server. On the **Administration** workspace, an administrator can perform the following tasks:

- View folders and reports that are stored in the SAS Content Server.
- Create or delete SAS Content Server locations for reports.

Note: To delete a repository, click the **Delete location** button on the **Administration** workspace. Do not use the SAS Content Server Admin Console or SAS Management Console to perform this action.

> **TIP** After deleting a SAS Content Server root location, sign out of ITRM Report Center and then sign in again. This action enables you to avoid unexpected errors.

- Assign SAS Content Server locations for access by groups that are members in the IT Resource Management: Report Center User role.

  SAS Content Server locations can also be shared with users who are Authenticated SASUsers, as denoted by IT Resource Management Report Center Viewers (SASUSERS) groups.

  > **TIP** After you have assigned a SAS Content Server root location to a user group, sign out of ITRM Report Center and then sign in again. This action enables you to avoid unexpected errors.

- Purge reports from the SAS Content Server.
- Refresh the ITRM Report Center cache.

Note: If a new group is created but is not yet assigned with a SAS Content Server location, a user from that group can still access reports in the SAS Content Server locations that are available to the IT Resource Management Report Center Viewers (SASUSERS) group.

For more information, see the Chapter 10, “Administrative Tasks” in the *SAS IT Resource Management 3.6: Reporting Guide*.

Note: Members of the IT Resource Management Administrators group have access to this and all other ITRM Report Center workspaces. SAS administrators (members of the Metadata Server: Unrestricted role) can access only the ITRM Report Center **Administration** workspace. They cannot access the other workspaces of ITRM Report Center.

Working with Multiple SAS Content Server Locations

By default, SAS IT Resource Management reports are written to **<*Middle-Tier-Server-Name*>/SASContentServer/repository/default/sasdav/ITRM**. All users of ITRM Report Center have access to this location.

Your site might want to create multiple locations to which IT Resource Management reports are written. Creating multiple locations enables you to control access to those reports by using SAS metadata-based application groups. To assign a group to a SAS Content Server location, that group must be a member of the IT Resource Management Report Center Viewer (SASUSERS) group, the default IT Resource Management Report Center User group, or a custom IT Resource Management Report Center User group.

For more detailed information about how to create and assign access to SAS Content Server locations that are used by SAS IT Resource Management, see the Chapter 10, “Administrative Tasks” in the *SAS IT Resource Management 3.6: Reporting Guide*.

If a user requires access to multiple SAS Content Server locations, then that user should be a member of multiple custom ITRM user groups. Alternatively, the user can be a member of the default ITRM user group and other custom ITRM user groups.

Appendix 1

Report Properties

Report Properties of Performance Reports

The expanded list of report properties of a selected report is displayed if you click the Properties icon () in the **Gallery** workspace.

Display A1.1 Expanded List of Properties

Expanded Report Properties

Property	Value
Report Title	System CPU Busy Percent and Hardware Msu and Mips by Engine Type
Domain Category	ITRMDomainIntelligence
ReportType	Performance
Sysplex	DEVAPLEX
Machine	DEVA
Date	Aug 13, 2012
DayOfWeek	Mon
Keywords	Performance
Schedule Frequency	Daily
Project	SampleReportsSMF
Data Source	DayHourSystem
Data Path	/Shared Data/SAS IT Resource Management/IT Data Marts/SmfRmfSystemLparWorkloadSampleReports/I
Process Flow	RMFSystem
Report Definition	CpuBusyReportsHoursForTheDay
Report Author	Supplied
Expire After (Days)	999
Report URL	http://rdcesx11100.race.sas.com:80/SASContentServer/repository/default/sasdav/ITRM/SampleReports/

The expanded list of the report properties of performance reports consists of these items:

- Report Title
- Domain Category
- Domain Subcategory
- Report Type (list of BY variables such as Date, Machine, and so on)
- Keywords
- Job Schedule Frequency
- IT Data Mart Name
- Job Name
- Data Source
- Data Path

Note: The **Data Path** is available if you store the data path with report definitions that you create. Data paths are not stored with supplied report definitions.

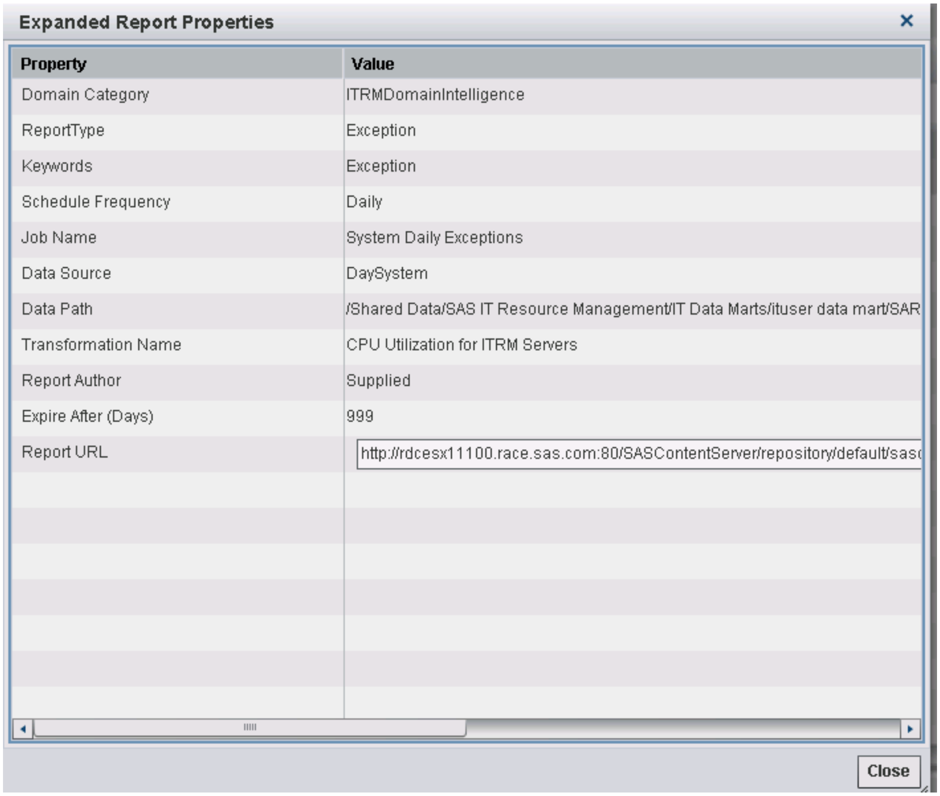
- Process Flow
- Transformation Name
- Report Definition
- Report Author
- Expire After
- Report URL

Note: Some properties might not appear if they were not defined by the user.

Report Properties of Exception Reports

The list of exception report properties of a selected report is displayed if you click the Properties icon () in the **Gallery** and **Resource** workspaces.

Display A1.2 *Expanded List of Exception Report Properties*



Property	Value
Domain Category	ITRMDomainIntelligence
ReportType	Exception
Keywords	Exception
Schedule Frequency	Daily
Job Name	System Daily Exceptions
Data Source	DaySystem
Data Path	/Shared Data/SAS IT Resource Management/IT Data Marts/ituser data mart/SAR
Transformation Name	CPU Utilization for ITRM Servers
Report Author	Supplied
Expire After (Days)	999
Report URL	http://rdcesx11100.race.sas.com:80/SASContentServer/repository/default/sas(

The list of report properties for exception reports consists of these items:

- Domain Category
- Domain Subcategory
- Report Type
- Keywords
- Job Schedule Frequency
- IT Data Mart Name
- Job Name
- Data Source
- Data Path

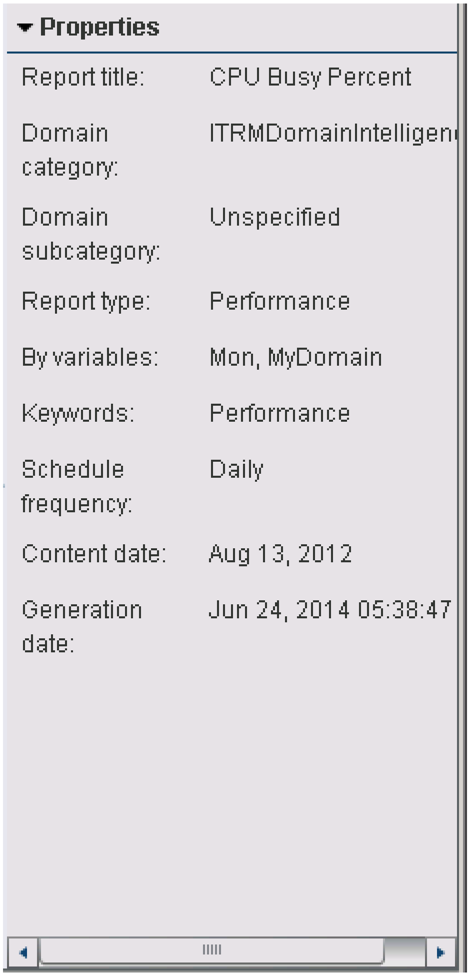
- Transformation Name
- Report Author
- Expire After
- Report URL

Note: Some properties might not appear if they were not defined by the user.

Abbreviated List of Report Properties

The abbreviated list of report properties of a selected report is displayed in the right pane of the **Gallery** and **Resource** workspaces.

Display A1.3 *Abbreviated List of Report Properties*



The abbreviated list of report properties consists of these items:

- Report Title
- Domain Category
- Domain Subcategory
- Report Type (list of BY variables such as Date, Machine, and so on)
- Keywords
- Job Schedule Frequency

- Content Date
- Generation Date

Note: Some properties might not appear if they were not defined by the user.

Appendix 2

Sample Reports

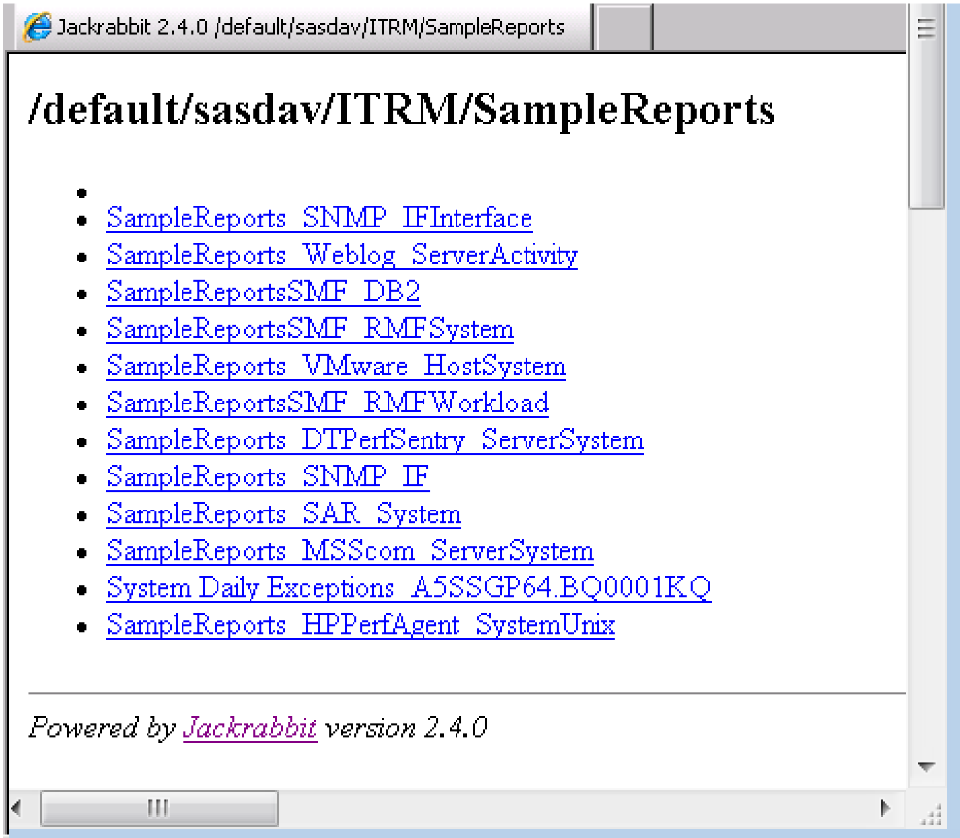
About Sample Reports

During the SAS IT Resource Management installation, multiple sample reports are stored in the SAS Content Server. These reports provide examples of the different types of reports that SAS IT Resource Management can create. They also enable you to practice using ITRM Report Center before you generate your own reports.

SAS IT Resource Management provides 30 sample performance reports and 4 sample exception reports. These samples include various plots and charts that demonstrate how your reports might look when you begin working with SAS IT Resource Management. Each sample report also includes a combination of BY variables.

As shown in the following display, the sample reports are stored in the SAS Content Server in the `/sasdav/ITRM/SampleReports` folder.

Display A2.1 *Samples Folder in the SAS Content Server*



Administrators can access this folder from the **Administration** workspace of ITRM Report Center. To do so, click the **Open SCS Viewer Console** button and navigate to/default/sasdav/ITRM/SampleReports.

The sample performance and exception reports each include the **DomainCategory ITRMDomainIntelligence** so that you can identify and work with them in ITRM Report Center. The reports also include additional BY variables that you can use as filters in ITRM Report Center.

To distinguish the performance reports from the exception reports, the sample reports use the **Keyword** attribute as follows:

- The sample performance reports each include the keyword **Performance**.
- The sample exception reports each include the keyword **Exception**.

This enables you to identify and work with the reports in ITRM Report Center.

The following two topics explain how to create separate galleries for sample performance and sample exception reports.

TIP If you want a single gallery for all sample reports, follow the instructions here, but do not specify a **Keyword**.

Create a Gallery of Sample Performance Reports in ITRM Report Center

To create a gallery of these sample performance reports, perform the following steps:

1. Open ITRM Report Center.
2. In the **Gallery** workspace, click My Galleries and Albums in the left pane.
3. Click the New icon (). Select **New Gallery**.
4. Enter a **Name** and **Description** for the new gallery. Click **Next** to advance to the page where you can select the primary filters for the gallery.
5. Click **Domain Category**. Then check the **ITRMDomainIntelligence** box. This action moves that domain category to the **Selected Items** list.
6. Click **Keywords** to display the entries in that folder. Then check the box next to the **Performance**.
7. Click **Next** to display the Secondary Filters page of the wizard. On this page, you can click **Finish** to create the gallery.

Note: All sample performance reports include the domain category **ITRMDomainIntelligence** and the keyword **Performance**. If this domain category and this keyword do not appear as available options in your ITRM Report Center session, then the sample performance reports are no longer on your SAS Content Server. Contact your systems administrator for assistance.

Note: Sample reports can be deleted from the SAS Content Server by the SAS administrator. For more information, see the “Administrative Tasks” chapter in the *SAS IT Resource Management 3.6: Reporting Guide*.

Create a Gallery of Sample Exception Reports in ITRM Report Center

To create a gallery of sample exception reports, perform the following steps:

1 Open ITRM Report Center.

2 In the **Gallery** workspace, click My Galleries and Albums in the left pane.

3 Click the New icon (). Select **New Gallery**.

4 Enter a **Name** and **Description** for the new gallery. Click **Next** to advance to the page where you can select the primary filters for the gallery.

5 Click **Domain Category**. Then check the **ITRMDomainIntelligence** box. This action moves that domain category to the **Selected Items** list.

6 Click **Keywords** to display the entries in that folder. Then check the box next to the **Exception**.

7 Click **Next** to display the Secondary Filters page of the wizard. On this page, you can click **Finish** to create the gallery.

Note: All sample exception reports include the domain category **ITRMDomainIntelligence** and the keyword **Exception**. If this domain category and keyword do not appear as available options in your ITRM Report Center session, then the sample exception reports are no longer on your SAS Content Server. Contact your systems administrator for assistance.

Appendix 3

Troubleshooting Problems in ITRM Report Center

Using Multiple Open Sessions of ITRM Report Center on a Single Workstation

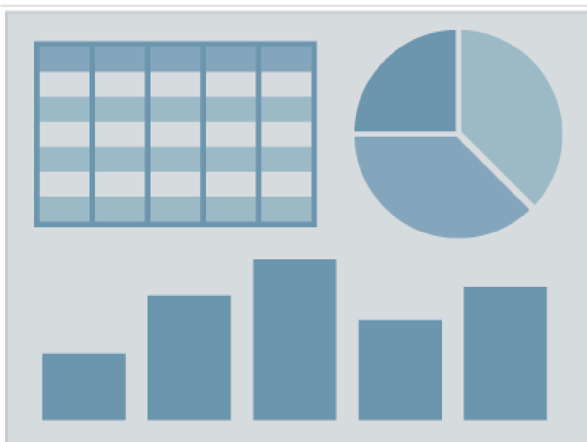
CAUTION! Do not open multiple instances of ITRM Report Center at same time.
Unexpected results could occur if a user uses the same authentication credentials to

open and operate multiple sessions of the ITRM Report Center web application at the same time.

Several web browsers support a feature that merges multiple open sessions. This feature shares cookies, sign-in credentials, and preferences among all open sessions of the browser. If your workstation has multiple sessions of ITRM Report Center open with different sign-in credentials, then the actions that you perform in one session might adversely affect what you see in the other open sessions.

Static Image Is the Expected Image for Tabular Reports

Display A3.1 *Static Image*



The preceding image is displayed for tabular reports. Click the static image to view the tabular report.

Issues with Alert Notifications

Report Cannot Be Opened

If you receive an alert notification about a report that resides in a repository for which you do not have the appropriate permission, you cannot open the report. A message indicates that you cannot access the report because you do not have the appropriate permission.

Similarly, if you receive an alert notification that a report that once resided in a repository has been deleted by an IT Resource Management Report Center Administrator, you cannot open the report. A message indicates that you cannot access the report because the repository does not exist.

Alert Notifications Are Deleted

If a user unsubscribes from any alert, the previous notifications for that alert are deleted.

Alerts Window Is Not Available

If you are signed in as a member of the SASUSERS group, the Alerts window is not available.

Alert Notifications Are Not Displayed

If alert notifications are not displayed on the **Home** workspace, close ITRM Report Center and then log on again.

Location of ITRM Report Center Log

The ITRM Report Center log is located in the SAS middle-tier server at `YourSASConfigFolder\Lev1\web\Logs\SASServer10_1\ITRMReportCenter3.6.log`. If errors are reported in the log, save a copy of the log and contact SAS Technical Support.

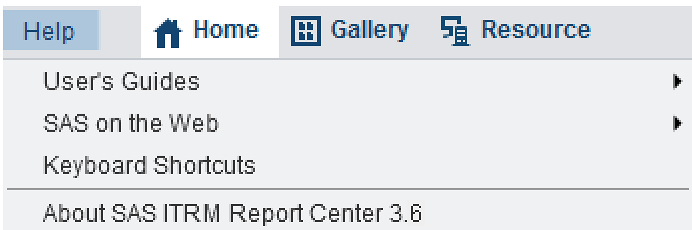
The log contains the application name and the status information pertaining to the application start-up process.

Note: For information about setting the logging level for the tc server, see the topic called “How to Set the Logging Level for the tc Server”. It is located in the Appendix 9, “Best Practices and Troubleshooting Tips” in the *SAS IT Resource Management 3.6: Administrator’s Guide*.

Configuration Details

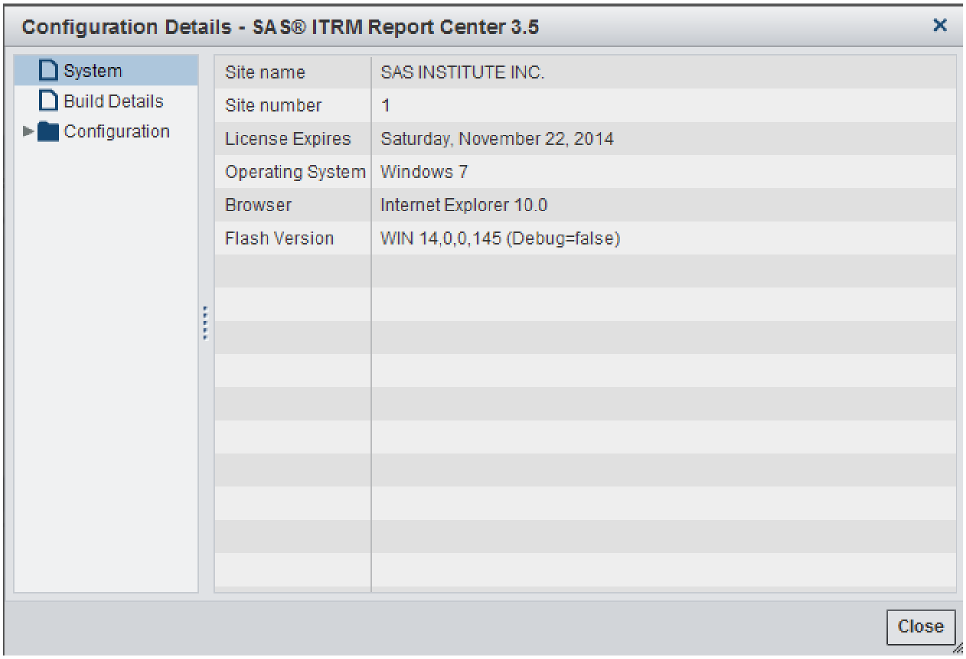
When reporting problems to SAS Technical Support, include information about your configuration. To access the Configuration Details window, select **Help** in the workspace bar. The **Help** menu appears:

Display A3.2 *List of Help Menu Items*



Select **About SAS ITRM Report Center 3.6** and open the Configuration Details window.

Display A3.3 *Configuration Details Window*



Deleting an SCS Folder Location

To delete an SCS folder location, use the **Delete location** button on the **Admin** Workspace. This action deletes the folder and the reports that are contained in the SAS Content Server location.

Do not use the SAS Management Console or the SAS Content Server Admin Console to perform this action.

Issues with the ITRM Report Center Workspaces

If your view of a workspace is not what you expect, you might need to clear your browser cache.

Recommended Reading

- *SAS IT Resource Management 3.6: Overview*
- *SAS IT Resource Management 3.6: Reporting Guide*

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