SAS® IT Resource Management 3.2
Gallery Manager User's Guide
Second Edition
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About This Book

Audience

SAS IT Resource Management — Gallery Manager, referred to as Gallery Manager throughout the remainder of this document, 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: Gallery Manager User’s Guide* is written for the following types of users:

IT Resource Management Administrators

These users are responsible for building and managing IT data marts and preparing data for reports. They use Gallery Manager to work with gallery folders and reports that are accessible from the application.

IT Resource Management Users

These users are business people who are interested in the overall performance aspects of IT at a company. They use Gallery Manager to create, view, and manage their own galleries of SAS IT Resource Management reports.

Some organizations have different individuals performing the duties of each of these roles. Others are organized so that one person handles several roles.
About This Book
Chapter 1
About Gallery Manager

What is Gallery Manager?

Gallery Manager is a Web application that is available with SAS IT Resource Management. This application enables users to view, organize, filter, save, and e-mail SAS IT Resource Management reports. You can use Gallery Manager to group reports into galleries and then further filter or subset the reports for viewing.

Gallery Manager enables you, based on your login permissions, to designate gallery folders as public or private. These settings control who has access to the gallery folders and galleries that you create. You can save reports as Favorites and keep them for viewing later or e-mail them to others.

Benefits of Using Gallery Manager

Gallery Manager enables users to organize and view the reports that are created using SAS IT Resource Management. You can use Gallery Manager to perform the following tasks:

• Create gallery folders to group and categorize galleries.
• Create galleries to group and categorize reports.
• View IT performance management and capacity planning reports that are generated using SAS IT Resource Management.
• Edit, copy, and delete gallery folders and galleries.
• Share gallery folders and galleries with other Gallery Manager users.
• Filter galleries to work with smaller or logical subsets of reports.
• Interact with ActiveX or Java reports to view data tips or drill down for more report detail.
• Copy reports to Favorites.
• E-mail or share reports with other users who have access to the SAS Content Server that stores the reports.

How Gallery Manager Works

Gallery Manager is a Web-based application that enables you to organize, view, and share SAS IT Resource Management reports that are stored on the SAS Content Server.

Organizing Reports

You can organize SAS IT Resource Management reports with the following two components:

• 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.
  
  Gallery Manager also enables you to 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.

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

Viewing Reports

Gallery Manager provides three gallery views that enable you to view and sort the reports in different ways:

• The Table view displays the reports and their associated metadata in a grid. You can quickly scan these reports for similarities and double-click an individual report to view a large image of it in a separate browser window.
Display 1.1  A Gallery in the Table View

The Thumbnail view displays a thumbnail of each report and enables you to minimize, expand, and arrange the reports in the gallery.

Display 1.2  A Gallery in the Thumbnail View

The Flow view displays the reports as moveable pages so you can navigate through a sequence of reports that are stacked together.
Copying and E-mailing Reports

Gallery Manager enables you to copy reports of particular interest into Favorites folders. Until deleted manually, report copies in the Favorites folders are saved on the SAS Content Server in a physical folder that is unique to each Gallery Manager user. The report copies in the Favorites folders are not purged, expired, or updated as part of any subsequent executions of their associated report jobs. You can e-mail the reports that are in Favorites folders.

How to Get Help and Documentation for Gallery Manager

Gallery Manager 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 Gallery Manager 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. You can also place the mouse pointer over an element in the user interface to view the associated tooltip for more information.

SAS IT Resource Management: Gallery Manager User's Guide

This document, available as a PDF file, provides detailed information about the concepts and tasks that are related to using Gallery Manager. To access this document, click Help ⇒ User's Guide (PDF) in the application.

Additional documentation and references are also available from the Help menu in Gallery Manager. To access these resources, click Help in the Gallery Manager application and select from the following menu options:
Accessibility Features of Gallery Manager

Overview

Gallery Manager includes the following accessibility and compatibility features that improve usability of the product for users with disabilities. These features are related to accessibility standards for electronic information technology that were adopted by the U.S. Government under Section 508 of the U.S. Rehabilitation Act of 1973, as amended.

If you have questions or concerns about the accessibility of SAS products, send an e-mail to accessibility@sas.com.

Keyboard Navigation

Gallery Manager conforms to accessibility standards for the Windows platform. Gallery Manager can be navigated by using the keyboard. The following table includes some of the most commonly used guidelines:

Table 1.1 Standard Keyboard Navigation

<table>
<thead>
<tr>
<th>Task</th>
<th>Keyboard Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move forward through controls</td>
<td>TAB</td>
</tr>
<tr>
<td>Move backwards through controls</td>
<td>SHIFT+TAB</td>
</tr>
<tr>
<td>Display drop-down list contents</td>
<td>CTRL+down arrow</td>
</tr>
<tr>
<td>Display menus that have focus</td>
<td>Down arrow</td>
</tr>
<tr>
<td>Activate buttons and menu selections</td>
<td>ENTER</td>
</tr>
</tbody>
</table>

Accessibility of Other SAS Products

Gallery Manager might require that you perform some tasks with other SAS products such as SAS IT Resource Management, SAS Data Integration Studio, SAS Enterprise...
Guide, and SAS Management Console. These SAS products include accessibility and compatibility features that improve their usability for users with disabilities.

The accessibility features for these SAS products are described in their respective documentation. To locate the appropriate documentation for a SAS product, use the A-Z index at this location: http://support.sas.com/documentation/index.html.
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Accessing Gallery Manager

Log On as a Registered User

To log on to Gallery Manager, perform the following steps:

1. In the address bar of your Web browser, enter the URL for Gallery Manager and press ENTER. The logon window for Gallery Manager appears.

   Note: Contact your system administrator if you do not have the URL for Gallery Manager.

   Display 2.1  Gallery Manager Log On Window

2. Enter a user ID and password. Your user ID might be case-sensitive, depending on the operating system that is used to host the application server. Your password is case-sensitive.

3. Click Log On. The Gallery Manager interface appears.

User Group Authorization

Gallery Manager supports the following user groups:

- IT Resource Management Administrator.
- IT Resource Management User.
- Other users. These users are authorized to access Gallery Manager but they are not members of either the IT Resource Management Administrator or IT Resource Management User groups.

Each user group has a defined set of tasks that they can perform when working with public and private galleries in the application. Gallery Manager users can perform only the tasks that are authorized for the user group to which they belong. For example, a
A public gallery is accessible by everyone. However, a private gallery is accessible only by
the person who created it and members of the IT Resource Management Administrator
group.

The following table provides more information about the specific tasks that each user
group can perform with public and private galleries. The three columns on the right
indicate the type of access authorization that is required to perform the tasks that are
listed on the left.

**Table 2.1 Access Authorization Needed to Perform Tasks with Gallery Manager**

<table>
<thead>
<tr>
<th>Type of Gallery</th>
<th>Task</th>
<th>IT Resource Management Administrator</th>
<th>IT Resource Management User</th>
<th>Other users (not IT Resource Management Administrator or User)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>Create a public gallery.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Public</td>
<td>Modify a public gallery.</td>
<td>No, unless this IT Resource Management Administrator created it.</td>
<td>No, unless this IT Resource Management User created it.</td>
<td>No</td>
</tr>
<tr>
<td>Public</td>
<td>Delete a public gallery.</td>
<td>Yes</td>
<td>No, unless this IT Resource Management User created it.</td>
<td>No</td>
</tr>
<tr>
<td>Public</td>
<td>View a public gallery.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Private</td>
<td>Create a private gallery.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>Modify or delete your own private gallery.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>Modify or delete another user's private gallery.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>View your own private gallery.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>View another user's private gallery.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

For more information, see “Working with Galleries” on page 22.

SAS IT Resource Management Administrators can use SAS Management Console to
assign individual users to the appropriate group and to customize the metadata access as

Log Off from Gallery Manager

To log off from Gallery Manager, click Log Off in the upper right corner of the user interface.

By default, if Gallery Manager is open for 30 minutes with no activity, then a warning message appears. This message states that you will be logged off and the session will close unless you choose to continue the session.

The Gallery Manager Interface

Your First Look at the Gallery Manager Interface

The Gallery Manager interface is divided into several parts that enable you to manage your gallery folders and galleries. The following image shows a Gallery Manager interface and its five primary parts:

Figure 2.1 Gallery Manager Interface

1. Gallery Manager banner
2. Browse pane
3. Gallery pane
4. Favorites pane

Note: The Filters pane (not shown above) also resides in this area of the Gallery Manager interface. When you select a gallery in the Browse pane, you can use the icons at the top of the pane to toggle back and forth from the Browse pane to the Filters pane.
Status bar

Note: Each pane includes an Action button that provides task options that are related to the objects in the pane.

**Gallery Manager Banner**

The Gallery Manager banner provides identifiers (the application name and SAS logo), a link to more Gallery Manager documentation, and the **Log Off** option. These features help you to identify and use the application effectively.

**Browse Pane**

The Browse pane, located on the left side of the Gallery Manager interface, includes a tree view of gallery folders and galleries that you can browse and navigate. This pane appears by default when you open the Gallery Manager.

**Display 2.2  Browse Pane**

The Browse pane consists of a tree view that has the following two main folders:

- **My Galleries** contains folders and galleries that a user creates and defines. The content of the **My Galleries** folder is different for each individual user based on the gallery folders and galleries that the user creates.

  Note: A **My Galleries** folder is not available to users who are not members of the IT Resource Management Administrator or IT Resource Management User groups.

- **Public Galleries** contains folders and galleries that are designated as public. All Gallery Manager users can see the folders and galleries in the **Public Galleries** folder.

For more information, see “Navigating Gallery Folders and Galleries” on page 31.

The Browse pane shares space with the Filters pane. The icons at the top of these panes enable you to toggle back and forth from the Browse pane to the Filters pane. If the Filters pane is visible, then click the Browse icon ( ) to view the Browse pane.

For more information about the Filters pane, see “Filters Pane” on page 11.

**Filters Pane**

The Filters pane, located on the left side of the Gallery Manager interface, enables you 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 pane so that you can limit the display to those specific reports that meet the filter criteria that you specify.

To access the Filters pane, select a gallery in the Browse pane and then click the Filters icon (🔍).

Display 2.3  Filters Pane

The Filters pane shares space with the Browse pane. The icons at the top of these panes enable you to toggle back and forth from the Filters pane to the Browse pane.

For more information about working with the Filters pane, see “Filtering Reports in an Existing Gallery” on page 36. For more information about the Browse pane, see “Browse Pane” on page 11.

Gallery Pane

The Gallery pane is the center pane of the Gallery Manager interface. This pane enables you to view the details about the gallery folders and galleries that you select in the Browse or Favorites panes. The Gallery pane also enables you to view the reports that you select in a gallery.

The information in the Gallery pane varies based on whether you select to view gallery folders, a gallery, or a report. Here are the ways that the Gallery pane displays information based on the object that you select:

- If you select a gallery folder in the Browse pane, then the Gallery pane displays the name of the gallery folder in its banner. The Gallery pane also displays the next level of gallery folders or galleries that the selected folder contains.
In the following example, the **My Galleries** folder is selected in the Browse pane. This folder's first level of contents (the **Sample Reports** gallery and the **DEVA Machine Galleries** folder) is displayed in the Gallery pane.

Display 2.4  Contents of a Gallery Folder Displayed in the Gallery Pane

For more information about gallery folders, see “View and Navigate Gallery Folders” on page 19.

- If you select a gallery in the Browse pane, then the Gallery pane displays the name of the gallery in its banner. The Gallery pane also displays information about each report in the gallery or each report that meets the filter criteria that you specified on the Filters pane. The status bar provides the number of reports that are available in current instance of the Gallery pane.

The Gallery pane provides three formats for viewing reports. You can click one of the **View** icons at the top of the Gallery pane to select the view that you want to use when viewing the reports. In each view, you can double-click any report to open it in a separate browser window.

Display 2.5  View Icons in the Gallery Pane

Here are the three views that the Gallery pane provides for viewing the reports in a gallery:

- **Table view** displays a list or grid of the reports. This is the default view. The following image shows a gallery named **My Sample Reports** in the banner and the associated reports in the gallery are listed in the Table view.
Display 2.6  A Gallery Displayed in the Table View

For more information, see “Table View” on page 40.

• Thumbnail view ( thumbnail ) displays small images or thumbnails of the reports. The following image shows a gallery named My Sample Reports in the banner and the associated reports in the gallery are displayed in the Thumbnail view.

Display 2.7  A Gallery Displayed in the Thumbnail View

For more information, see “Thumbnail View” on page 42.

• Flow view ( ) displays images of the reports in a stacked sequence. The following image shows a gallery named My Sample Reports in the banner and the associated reports in the gallery are displayed in the Flow view.
Display 2.8  A Gallery Displayed in the Flow View

Favorites Pane

The Favorites pane, located on the right side of the Gallery Manager interface, contains copies of the reports that you choose to save for your personal records or to e-mail others. The Favorites pane enables you to create and name Favorites folders. In these folders, you can organize and store the report copies that show data of a particular interest.

Display 2.9  Favorites Pane

For more information, see “Flow View” on page 44.

Status Bar

The status bar, located at the bottom of the Gallery Manager interface, displays the user ID that is logged on the application. This bar also displays various messages that relate to the current processes, views, or user actions that are running on the application.
For example, the following status bar provides the number of reports that are contained in the selected gallery and the current user ID that is logged on the application.

Display 2.10 Status Bar

| Selected gallery has fetched 741 reports | Logged in as admadm |

**Action Buttons**

Each pane of the Gallery Manager includes an Action button. This button enables you to perform tasks that are related to the given pane. The options that are available for each Action button vary based on the permissions of the user, the pane where the button resides, and the capabilities of the selected objects in the respective pane. For example, the Action button for the Browse and Filters panes enables you to perform the following tasks that are related to gallery folders and galleries:

- Create a new gallery folder or gallery.
- Edit, copy, or delete a gallery folder or gallery.
- Mark a gallery folder as public or private.

*Note:* This option is available only if the selected gallery folder is in the first level of the My Galleries folder.

These options vary based on the current Gallery Manager selections. For example, if nothing is selected in the Browse pane when you click the Action button in that pane, then the Edit, Copy, Delete, Public, and Private options are not available.

In addition, the Action buttons in other panes enable you to perform different tasks that are related to their respective pane. For example, the Action button in the Favorites pane provides task options that are related to Favorites folders and reports.

**Icons and Others Buttons**

Gallery Manager provides several icons and buttons in the interface. Some icons and buttons perform tasks when clicked. Others identify a component or its properties.

The following table lists the primary icons and buttons in Gallery Manager:

<table>
<thead>
<tr>
<th>Table 2.2 Icons and Buttons in the Gallery Manager Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Icon or Button</strong></td>
</tr>
<tr>
<td>![icon]</td>
</tr>
</tbody>
</table>
| ![icon] | Filter | Click this icon to access the Filters pane.  
*Note:* This icon is dimmed unless a gallery is selected in the Browse pane. |
| ![icon] | Table view | Click this button to view reports in the Table view. |
| ![icon] | Thumbnail view | Click this button to view reports in the Thumbnail view. |
### Working with Gallery Folders

#### About Gallery Folders

Gallery folders, accessible from the Browse pane and Gallery pane, can contain one or more galleries as well as one or more subfolders that can also contain galleries. Gallery folders provide a convenient way to organize galleries. You can create and organize a hierarchy of gallery folders that categorize and store your galleries of reports. This structure enables you to store, manage, and locate your reports easily. For more information about galleries, see “Working with Galleries” on page 22.

You can view the contents of a gallery folder by using one of the following two methods:

- Click the arrow next to the gallery folder name in the Browse pane. The folder expands in the tree and the next level of objects in the folder appears in the tree.
- Click a gallery folder in the Browse pane or double-click a gallery folder in the Gallery pane. The contents of the folder appear in the Gallery pane. The Gallery pane provides additional information about the gallery folders and galleries that it displays in the Table view.

<table>
<thead>
<tr>
<th>Icon or Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Flow view" /></td>
<td>Flow view</td>
<td>Click this button to view reports in the Flow view.</td>
</tr>
<tr>
<td><img src="image" alt="Action" /></td>
<td>Action</td>
<td>Click the arrow next to this button to perform various tasks that are available for the selected item or pane.</td>
</tr>
<tr>
<td><img src="image" alt="Public gallery folder" /></td>
<td>Public gallery folder</td>
<td>Signifies that the component is a public gallery folder.</td>
</tr>
<tr>
<td><img src="image" alt="Private gallery folder" /></td>
<td>Private gallery folder</td>
<td>Signifies that the component is a private gallery folder.</td>
</tr>
<tr>
<td><img src="image" alt="Public gallery" /></td>
<td>Public gallery</td>
<td>Signifies that the component is a public gallery.</td>
</tr>
<tr>
<td><img src="image" alt="Private gallery" /></td>
<td>Private gallery</td>
<td>Signifies that the component is a private gallery.</td>
</tr>
<tr>
<td><img src="image" alt="Report" /></td>
<td>Report</td>
<td>Signifies that the component is a report. Click this icon to view a thumbnail image of the report.</td>
</tr>
<tr>
<td><img src="image" alt="Favorites folder" /></td>
<td>Favorites folder</td>
<td>Signifies that the component is a Favorites folder.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Click this icon to view Help about the current topic.</td>
</tr>
</tbody>
</table>
Create a Gallery Folder

The My Galleries folder contains all of the gallery folders and galleries that you create, regardless of whether they are public or private. When you create a gallery folder, it is stored within the My Galleries folder.

To create a new gallery folder, perform the following steps:

1. In the Browse or Gallery pane, click the arrow next to the Action button and select New Gallery Folder.

2. In the Name field, enter a unique name for the folder. The name of a gallery 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 this new gallery folder is to be stored.

5. Select the status of the gallery folder as private or public. The status specifies whether the gallery folder is viewable only by you (private) or whether other users of Gallery Manager can view the folder (public). The default status is private unless you select Mark as public.

You can specify the status of a gallery folder only if it is located at the first level under My Galleries. All subfolders and galleries within a gallery folder automatically adopt the same status as their parent folder. Therefore, the status of a folder and its contents is determined only at the first level in the My Galleries.
folder. For more information, see “Public and Private Gallery Folders and Galleries” on page 32.

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

**View and Navigate Gallery Folders**

You can use the Browse pane and the Gallery pane to view and navigate through the gallery folders that are available in the Gallery Manager. The Browse pane displays the gallery folders and galleries in a tree view. You can click the arrow next to the name of a gallery folder to expand the folder and view its components. Click a gallery folder in the Browse pane to open the folder in the Gallery pane.

The following example shows the **My Galleries** folder selected in the Browse pane and its first level of contents displayed in the Gallery pane.

*Display 2.12  A Gallery Folder in the Gallery Pane*

The Gallery pane displays the following information about the first level of subfolders and galleries in a gallery folder:

- **Name** specifies the name of the gallery folder or gallery.
- **Type** specifies whether the object is a gallery folder or a gallery. The icon to the left of each row also identifies the object.
- **Status** specifies whether the gallery folder or gallery is public or private.
- **Last Modified Date** specifies the date when the gallery folder or gallery was last changed.

The column headings of the grid 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.

In the Browse pane and the Gallery pane, you can navigate the gallery folders to locate the gallery that you want to view. Then, double-click a gallery to view its reports in the Gallery pane. For more information, see “Viewing Reports in a Gallery” on page 35.
Edit a Gallery Folder

You can change the name, description, location, and status of existing gallery folders. However, the folders that you have permission to edit are based on your user ID. You can edit only your own gallery folders that you create.

To edit a gallery folder, perform the following steps:

1. In the Browse pane, select the gallery folder that you want to edit.
2. In the Browse pane, click the arrow next to the **Action** button and select **Edit**.

   The Edit Gallery Folder dialog box appears.

   ![Edit Gallery Folder Dialog Box](Image)

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

4. If you are editing a gallery folder that resides on the first level of the **My Galleries** folder, then you can also edit the **Status** of the folder and its contents. Select **Mark as public** if you want the gallery folder and its contents to be public and accessible by all Gallery Manager users. Otherwise, the gallery folder and its contents are private and accessible only by you and members of the IT Resource Management Administrator group. For more information, see “Public and Private Gallery Folders and Galleries” on page 32.

5. Click **Save** to save your changes or **Cancel** to close the dialog box.

Copy a Gallery Folder

To copy a gallery folder, perform the following steps:

1. In the Browse or Gallery pane, select the gallery folder that you want to copy.

   **Note:** You can select only one gallery folder at a time in the Browse pane. However, you can hold down the CTRL or SHIFT key and select multiple gallery folders in the Gallery pane. If you copy multiple gallery folders at the same time, then the dialog box does not enable you customize the name and description of the folders. Therefore, you must ensure that the folders that you copy have names that are unique within the folder where you plan to store them.
2. In the Browse or Gallery pane, click the arrow next to the **Action** button and select **Copy**.

The Copy Gallery Folder dialog box appears.

**Display 2.14 Copy Gallery Folder Dialog Box**

3. In the **Name** field, enter a unique name for the folder. The name of a gallery folder can include no more than 60 characters. The default name is **Copy of <name of the original gallery folder>**.

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

5. In the **Location** group box, select a folder where this new gallery folder is to be stored. The new gallery folder inherits the public or private status from the folder where it is located.

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

**Delete a Gallery Folder**

You can delete a gallery folder to remove it and its contents from the Gallery Manager. However, this action does not delete the corresponding reports from the SAS Content Server.

*Note:* Members of the IT Resource Management User group can delete only the gallery folders that they created. Members of the IT Resource Management Administrator group can delete any gallery folder and its contents regardless of whether they created the folder.

To delete a gallery folder, perform the following steps:

1. In the Browse or Gallery pane, select the gallery folder that you want to delete. You can also hold down the CTRL or SHIFT key and select multiple gallery folders in the Gallery pane.

2. In the Browse or Gallery pane, click the arrow next to the **Action** button and select **Delete**.

3. Click **Yes** to delete the gallery folder.
Working with Galleries

About Galleries

Galleries are collections or groups of the reports that are generated by SAS IT Resource Management and placed on the SAS Content Server. Creating and working with galleries enables you to identify and group reports based on common variables. 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 report filters and the metadata that you can use to filter reports into a gallery, see the chapters about report definitions and the ITRM Gallery task in the SAS IT Resource Management: Reporting Guide.

Create a Gallery

Gallery Details: Step 1 of 4
To create a gallery, perform the following steps:

1. In the Browse or Gallery pane, click the arrow next to the Action button and select New Gallery. The Create 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 2.15  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 gallery folder. The name of a gallery can include no more than 60 characters.
When you copy a gallery, Gallery Manager creates a copy of the gallery and provides the default name Copy of <name of the original gallery>. If the name of your original gallery uses 60 characters, then the default name for the gallery copy will exceed the maximum character limit. For best results, name your galleries with 50 characters or less to allow for character additions later.

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

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

Note: The Status of the gallery is automatically set to public or private based on the status of the gallery folder that you selected in the Location group box. All components of a gallery folder have the same public or private status as their parent folder.

3. Click Next to specify the primary filters that are used to subset the reports into the gallery. Continue to “Primary Filters: Step 2 of 4” on page 23.

**Primary Filters: Step 2 of 4**

After you complete “Gallery Details: Step 1 of 4” on page 22, 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 and that are available for a particular machine, adapter data source, or keyword.
The following example shows the keyword `ITRMDomainIntelligence` selected as a primary filter for a gallery. This keyword is used to identify the sample reports that Gallery Manager provides.

**Display 2.16  Primary Filters Page of the Create Gallery Wizard**

The groups of primary filters in this wizard are the same as the filter groups that are available from the ITRM Gallery task in SAS Enterprise Guide. An ITRM Gallery task creates a report definition that assigns filter variables to the metadata for a SAS IT Resource Management report. The Gallery Manager uses these filter variables in report metadata to identify, filter, and sort the reports. For more information about working with the ITRM Gallery task and report definitions, see the *SAS IT Resource Management: Reporting Guide*. To locate the SAS IT Resource Management documentation, use the Products Index at [http://support.sas.com/documentation/index.html](http://support.sas.com/documentation/index.html).

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.
- **Domain Subcategory** for the appropriate domain subcategory that is associated with the domain category.
- **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 ITRM Gallery task, is a report filter in metadata only. It does not schedule report jobs and is not necessarily indicative of the date properties of the corresponding reports. This primary filter also does not correspond directly to the date variables that are available as secondary filters. It is simply a filter value that suggests when the corresponding report job should be run.
Keywords for other terms or variables by which you might filter the reports such as “Top 10 CPU usages.”

Note: A primary filter group does not appear in the list if there are no SAS IT Resource Management reports with a variable that is related to that filter group. For example, if none of your SAS IT Resource Management reports include a domain subcategory variable, then the Domain Subcategory option does not appear on this page of the wizard.

To select primary filters, perform the following steps:

a. Click the arrow next to a primary filter group. The primary filters that are available include only the variables that are present for at least one of the reports on the SAS Content Server.

b. Select one or more filter variables in the Available items box and then use the right arrow button to move the filters to the Selected items box. To deselect a filter, select the filter in the Selected items box and click the left arrow button to move the filter back to the Available items box.

Note: If you do not select any filters, then all of the SAS IT Resource Management reports on the SAS Content Server are included in the gallery. Likewise, if you do not select a variable in a given primary filter group, then the reports in the gallery can include any of the variables for that primary filter group. If you select at least one variable in a given primary filter group, then the reports in the gallery can include only the variables that you selected for the primary filter group.

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

Note: By default, primary filters must reduce the number of reports to no more than 4,000 before you can continue with the next step to subset the reports further with secondary filters. If the primary filters that you specify on this page do not reduce the number of potential reports to 4,000 or less, then an error message appears and you cannot continue to the next page. You must specify more primary filters to reduce the number of potential reports for the gallery. Your system administrator can configure this report limit to a different value for your organization if necessary. For more information, see the SAS IT Resource Management: Reporting Guide.

Secondary Filters: Step 3 of 4

After you complete “Primary Filters: Step 2 of 4” on page 23, 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 2.17  Secondary Filters Page of the Create Gallery Wizard

This page shows the number of SAS IT Resource Management reports that are on 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, or 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, such as tile charts, do not have a Date, StartOfWeek, or StartOfMonth BY variable. If you want to include these reports in the gallery, then select Yes for the Include reports with no date property option.

   Note: The current version of tile charts do not support BY variables. If you filter on a BY variable that is not related to a date, such as the BY variables in the Available items box, then tile charts are not included in the gallery. Because tile charts do not have BY variables, they do not meet your filter criteria to include only reports with the BY variables that you select.

b. Select the date-based reports 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. Thus, if you deselect the check box for a given time variable, then all of the reports with that time variable are included in the gallery unless other primary and secondary filters
disqualify the report. If you do not want to include any reports for a given time variable, then select the time variable and specify 0 Occurrences. For more information, see the next step.

c. In the Occurrences fields, specify the maximum number of instances (0 to 99) of the date variable that you want to include in the gallery. If a report includes a corresponding BY 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, 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 on the SAS Content Server and meets the primary filter criteria.
- A shaded cell indicates that the report is included in the gallery.

Figure 2.2  Reports That Are Included in a Gallery Based on Occurrences

<table>
<thead>
<tr>
<th>4 Occurrences for Date</th>
<th>01JUN</th>
<th>02JUN</th>
<th>03JUN</th>
<th>04JUN</th>
<th>05JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report A</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
</tr>
<tr>
<td>Report B</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td></td>
</tr>
<tr>
<td>Report C</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report D</td>
<td>■</td>
<td>■</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report E</td>
<td>■</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2 Occurrences for StartOfWeek</th>
<th>03MAY</th>
<th>10MAY</th>
<th>17MAY</th>
<th>24MAY</th>
<th>31MAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report F</td>
<td>■</td>
<td>■</td>
<td></td>
<td>■</td>
<td></td>
</tr>
<tr>
<td>Report G</td>
<td>■</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report H</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report I</td>
<td>■</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report J</td>
<td>■</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1 Occurrence for StartOfMonth</th>
<th>01FEB</th>
<th>01MAR</th>
<th>01APR</th>
<th>01MAY</th>
<th>01JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report K</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
</tr>
<tr>
<td>Report L</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

d. Select additional secondary filters to further subset the reports in the gallery. 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 button
to move selected filter variables to the **Selected items** box. To deselect a filter variable, select the filter in the **Selected items** box and click the left arrow button to move the filter back to the **Available items** box.

**Note:** If you do not select a variable in a given secondary filter category, then the reports in the gallery can include any of the variables for that secondary filter category. If you select at least one variable in a secondary filter group, then the reports in the gallery can include only the variables that you selected from the secondary filter group.

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

**Note:** By default, a gallery can contain no more than 2,000 SAS IT Resource Management reports. If the secondary filters that you specify on this page do not reduce the number of potential reports in the gallery to 2,000 or less, then an error message appears and you cannot continue to create the gallery. You must specify more primary and secondary filters on the previous pages to reduce the number of reports in the gallery. Your system administrator can configure this report limit to a different value for your organization if necessary. For more information, see the *SAS IT Resource Management: Reporting Guide*.

Continue to “Summary: Step 4 of 4” on page 28.

**Summary: Step 4 of 4**

After you complete “Secondary Filters: Step 3 of 4” on page 25, view the summary.

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

**Display 2.18 Summary Page of the Create Gallery Wizard**

This page provides the number of SAS IT Resource Management reports that are on 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.
**Edit a Gallery**

You can change the name, description, location, and filters of existing galleries. However, the galleries that you have permission to edit are based on your user ID. You can edit only your own galleries that you created.

To edit a gallery, perform the following steps:

1. In the Browse pane, select the gallery that you want to edit.
2. In the Browse pane, click the arrow next to the **Action** button and select **Edit**. The Edit Gallery wizard appears.

   ![Display 2.19  Edit Gallery Wizard](image)

3. Modify the values in the **Gallery Details**, **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 22.

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

**Copy a Gallery**

To copy a gallery, perform the following steps:

1. In the Browse or Gallery pane, select the gallery that you want to copy.
   
   **Note:** You can select only one gallery at a time in the Browse pane. However, you can hold down the CTRL or SHIFT key and select multiple galleries in the Gallery pane. If you copy multiple galleries at the same time, then the Copy Gallery dialog box does not enable you to change the name and description of the folders. Therefore, you must ensure that the galleries that you copy have names that are unique within the folder where you plan to store them.

2. In the Browse or Gallery pane, click the arrow next to the **Action** button and select **Copy**.
The Copy Gallery dialog box appears.

### Display 2.20  Copy Gallery Dialog Box

3. In the **Name** field, enter a unique name for the gallery. The name of a gallery can include no more than 60 characters. The default name is **Copy of <name of the original gallery>**.

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

5. In the **Location** group box, select a gallery folder where this gallery is to be copied. The copy inherits the public or private status of the folder where it is located.

6. Click **Save** to create the copy of the gallery or **Cancel** to close the dialog box.

### Delete a Gallery

You can delete a gallery to remove it from the Gallery Manager. However, this action does not delete the corresponding reports from the SAS Content Server.

*Note:* Members of the IT Resource Management User group can delete only the galleries that they created. Members of the IT Resource Management Administrator group can delete any gallery regardless of whether they created it.

To delete a gallery, perform the following steps:

1. In the Browse or Gallery pane, select the gallery that you want to delete. You can also hold down the CTRL or SHIFT key and select multiple galleries in the Gallery pane.

2. In the Browse or Gallery pane, click the arrow next to the **Action** button and select **Delete**.

3. Click **Yes** to delete the gallery folder.
Navigating Gallery Folders and Galleries

Understanding the Gallery Folder Structure

The Browse pane enables you to navigate and open gallery folders and galleries to locate reports. You can click the arrow to the left of a folder to view its contents. You can click a gallery to view its contents in the Gallery pane.

The gallery folders and galleries in the Browse pane are divided into the following folders:

My Galleries
This folder contains all of the gallery folders and galleries that you created, regardless of whether the folders or galleries are public or private. For more information about identifying public and private galleries, see “Public and Private Gallery Folders and Galleries” on page 32.

Note: Authorized users who are not members of the IT Resource Management Administrator or IT Resource Management User groups do not have permissions to manage personal gallery folders. Therefore, a My Galleries folder is not available to these users.

Public Galleries
This folder contains all of the gallery folders and galleries that other users create and mark as public. The first time a user creates a public folder or gallery, Gallery Manager creates a folder named <user name> Galleries in the Public Galleries folder. The <user name> Galleries folder contains the gallery folders (including their content) that the given user marks as public.

You cannot see a gallery folder with your user name in the Public Galleries folder. You can see only the public gallery folders of other users in the Public Galleries folder. When you log on with your user name, all of the gallery folders and galleries that you create are in the My Galleries folder.

For example, if a user named Samantha Cross creates a public gallery folder called SAR Galleries, then the gallery folder appears in her My Galleries folder when she uses her user ID to access Gallery Manager. The gallery folder icon indicates that her new gallery folder is public. Samantha can also see the public gallery folders for other users such as Marcel Dupree and Ahmed Zied.
When Ahmed Zied logs in to Gallery Manager with his user ID, his My Galleries folder contains all of the gallery folders and galleries that he created. His Public Galleries folder includes the public folder and gallery that Samantha Cross created in the preceding example. It is in the Samantha Cross Galleries subfolder.

Public and Private Gallery Folders and Galleries

You can designate gallery folders as public or private based on whether you want other users to see your galleries. This parameter is called the Status.

- Public status specifies that the gallery folder and its contents are available for all Gallery Manager users to view and copy. Your public gallery folders and their contents appear in your My Galleries folder and in the Public Galleries folder for other users.
You can modify and delete only the public gallery folders and galleries that you create.

*Note:* Members of the user group IT Resource Management Administrator can delete any public gallery folders or galleries regardless of whether they created the object.

- **Private** status specifies that the gallery folder and its contents are available only to the person who created it. Your private gallery folders and their contents appear in your *My Galleries* folder in the Browse pane.

You can view, copy, modify, and delete your own private gallery folders and galleries. Other Gallery Manager users cannot see or modify your private gallery folders or galleries and you cannot access theirs.

*Note:* Members of the user group IT Resource Management Administrator can view and delete any private gallery folders or galleries, regardless of who created the objects.

Gallery Manager uses different icons to designate whether a gallery folder or gallery is public or private. You can use these icons to quickly determine the status of an object.

The following table shows the status icons for each object in Gallery Manager:

**Table 2.3** Public and Private Icons for Gallery Folders and Galleries

<table>
<thead>
<tr>
<th>Object</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public gallery folder</td>
<td>![Folder Icon]</td>
</tr>
<tr>
<td>Public gallery</td>
<td>![Folder Icon]</td>
</tr>
<tr>
<td>Private gallery folder</td>
<td>![Folder Icon]</td>
</tr>
<tr>
<td>Private gallery</td>
<td>![Folder Icon]</td>
</tr>
</tbody>
</table>

The following display shows private and public folders in the Browse pane.
For more information about where to find public and private gallery folders and galleries in Gallery Manager, see “Understanding the Gallery Folder Structure” on page 31.

You can specify the Status of a gallery folder when you create or edit it. However, all gallery folders and galleries automatically inherit the same status as the gallery folder that contains them. Therefore, when creating a new gallery folder or gallery, you must consider the status of the gallery folder that will contain it. For example, if you copy an existing public folder and save the copy in a private folder, then the copy inherits a status of private.

Note: If you copy a gallery folder to the first level of the My Galleries folder, then the copy inherits a private status by default. You must modify the status of the gallery folder manually to specify a public status for the copied folder.

For more information, see “Change the Public or Private Status of a Gallery Folder or Gallery” on page 34.

**Change the Public or Private Status of a Gallery Folder or Gallery**

To change the public or private status of one or more gallery folders that reside on the first level of the My Galleries folder, perform the following steps:

1. In the Browse or Gallery pane, select the gallery folder that you want to edit.
   
   Note: In the Gallery pane, you can hold down the CTRL or SHIFT key and select multiple gallery folders.

2. In the Browse or Gallery pane, click the arrow next to the Action button and select Private or Public.
   
   If a selected gallery folder is marked as public, then the Private option appears in the list of menu options. If a selected gallery folder is private, then the Public option appears.

3. Click Yes.
   
   Note: All galleries that reside on the first level of the My Galleries folder are private. To change the status of these galleries, you must move them into a public gallery folder.
To modify the status of an existing gallery folder or gallery that is not on the first level of the My Galleries folder, you must change the status of the parent gallery folder or move the object to another folder that has the status that you want.

*Note:* If you copy a gallery folder or gallery to the first level of the My Galleries folder, then the copy inherits a private status by default.

For more information, see “Working with Gallery Folders” on page 17 and “Working with Galleries” on page 22.

---

**Viewing Reports in a Gallery**

*About Viewing Reports in a Gallery*

Gallery Manager enables you to view your IT reports in many different ways. Here are just a few of the tasks that you can perform when viewing your IT reports with Gallery Manager:

- Filter the reports in a gallery to view a subset of reports that meet your specified criteria.
- Review a detailed list of the reports.
- Sort through thumbnail images of the reports.
- Scroll through a sequential stack of the reports.
- Expand the reports into large images in their own Web browser.
- Interact with ActiveX or Java reports by placing the mouse on an item in an expanded report to view more layers of the report data.
- Copy the reports into Favorites folders.

*How to View Reports in a Gallery*

To view reports in a gallery, perform the following steps:

1. Select a gallery in the Browse pane. The reports that are in the gallery appear in the Table view of the Gallery pane. The following example shows the My Sample Reports gallery selected in the Browse pane. The reports that are in the My Sample Reports gallery are listed in the Gallery pane.
2. (Optional) Click the Filters icon ( ) at the top of the Browse pane to view the Filters pane. Select the filters that you want to use to subset the reports in the gallery for viewing. For more information about using the Filters pane, see “Filtering Reports in an Existing Gallery” on page 36.

3. At the top of the Gallery pane, select the View icon that corresponds to the format that you want to use when viewing the reports.

**Display 2.25 View Icons in the Gallery Pane**

For more information about the different views that are available in the Gallery pane, see the following topics:
- “Table View” on page 40
- “Thumbnail View” on page 42
- “Flow View” on page 44

### Filtering Reports in an Existing Gallery

**Understanding the Filters Pane**

The Filters pane enables you 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 so that you can limit the display to those specific reports that meet your filter criteria.

The filters in the Filters pane are organized into filter groups. You can click the arrow ( ) next to a filter group to see each variable that it includes. Then, click the check box for a filter variable to select it. When a variable is selected, a check ( ) appears in the corresponding check box.

**Tip**

If you select at least one variable within a filter group, then the check box for the filter group appears with a black square ( ). If you select all variables within a filter group, then the check box for the filter group appears with a check ( ).
After you select the filter variables that you want to use to subset the gallery reports, click **Apply**. The reports that meet your filter criteria appear in the Gallery pane.

**Note:** Click **Clear All** and then **Apply** if you want to remove all selections and start over. All of the reports in the gallery will appear in the Gallery panel.

**How Filters Work in the Filters Pane**

The filter variables in the Filters pane are criteria that restrict the gallery reports that are displayed in the Gallery pane. 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. The following image shows that if you select the variable DEVA, then only the gallery reports for the DEVA machine appear in the Gallery pane.

![Example of One Machine Filter Applied to View Reports in a Gallery](image)

When you select multiple filter variables in the Filters pane, Gallery Manager uses different algorithms to filter the reports based on whether the variables are selected within a single filter group or across filter groups. The following examples show how the Gallery Manager applies multiple filter variables from the Filters pane:

- 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.
Table 2.4  Example of Two Filter Variables Selected in a Single Filter Group

<table>
<thead>
<tr>
<th>Selected Filter Variables</th>
<th>Reports That Appear in the Galley Pane</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The reports in the Gallery pane must include one of the following variables for Domain Category:</td>
</tr>
<tr>
<td></td>
<td>• SNMP_IF</td>
</tr>
<tr>
<td></td>
<td>• SAR_System</td>
</tr>
<tr>
<td></td>
<td>All other reports in the gallery are not shown in the Gallery pane.</td>
</tr>
</tbody>
</table>

• 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.

Table 2.5  Example of Two Filter Variables Selected across Two Filter Groups

<table>
<thead>
<tr>
<th>Selected Filter Variables</th>
<th>Reports That Appear in the Galley Pane</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The reports in the Gallery pane must include both of the selected variables. Therefore, the Gallery pane displays only the SNMP_IF reports with the keyword Top.</td>
</tr>
<tr>
<td></td>
<td>All other reports in the gallery are not shown in the Gallery pane.</td>
</tr>
</tbody>
</table>
• If you select multiple filter variables across multiple filter groups, Gallery Manager uses the same rules above for multiple filters when determining the reports to display in the Gallery pane.

Table 2.6  Example of Multiple Filter Variables Selected in Multiple Filter Groups

<table>
<thead>
<tr>
<th>Selected Filter Variables</th>
<th>Reports That Appear in the Gallery Pane</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The reports in the Gallery pane must include one of the following combinations of variables:</td>
</tr>
<tr>
<td></td>
<td>• <strong>SNMP_IF</strong> and <strong>CPU</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>SNMP_IF</strong> and <strong>Top</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>SAR_System</strong> and <strong>CPU</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>SAR_System</strong> and <strong>Top</strong></td>
</tr>
</tbody>
</table>

All other reports in the gallery are not shown in the Gallery pane.

**How to Filter Reports in a Gallery**

To subset the number of reports that you want to view in a gallery, perform the following steps:

1. Click a gallery in the Browse pane to open the gallery.
2. Click the Filters icon ((filters icon) at the top of the Browse pane to view the Filters pane.
3. In the Filters pane, select the filters that you want to use to subset the reports in the open gallery. The list of available filters in the Filters pane varies based on the 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.

Click the arrow next to a filter group to view all of the possible variables that are associated with the filter. For example, a **Domain Category** filter group might include several variables from which you can choose, such as **VMware_GuestSystem**, **IBMSMF_RMFWorkload**, or **IBMSMF_RMPFpar**. If **VMware_GuestSystem** is selected as the only filter variable, then only the reports for the Guest System domain category of the VMware vCenter adapter are shown in the gallery pane.
4. Click **Apply**. Only the reports in the gallery that meet the filter criteria appear in the Gallery pane. You can then use the Gallery pane to view the reports. For more information about the using the Gallery pane, see “Gallery Pane” on page 12.

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

**Table View**

**About the Table View**

The Table view is the default view for the reports in a gallery. This view uses a grid format to display the following information about each report:

- **Report icon** ( ), when clicked, displays a thumbnail image of the report.
- **Report Title** specifies the title of the report.
- **BY Variables** specifies the BY variables that are in the report.
- **Report Creation Date** specifies the day that the corresponding report job was run and the report was created.
The following image shows the gallery My Sample Reports in the Table view of the Gallery pane:

**Display 2.28  Table View of Reports in the Gallery Pane**

In the Table view, you can drag and drop one or more reports from the Gallery pane into one of your Favorites folders. For more information about Favorites, see “Working with Favorites” on page 47.

**Viewing Reports in the Table View**

Click the Table view icon ( ) in the Gallery pane to view the list of reports in this tabular format.

The Table view enables you to visually scan information about the reports in the gallery. The columns in the table include additional information about the reports such as the title, BY variables, and creation date. You can adjust the width of each column in the table.

To view a report in the Table view, perform one of the following steps:

- Click the report icon ( ) to the left of a report in the grid to see a thumbnail of the report.
- Double-click a report in the grid to open a large version of it in a separate browser window. If the report was created in an ActiveX or Java format, then you can place the mouse pointer on an area in the expanded report to view more layers of the report data.

*Note:* ActiveX is supported only on Internet Explorer.

For example, the following image shows the interactive capability of an ActiveX report. When the mouse pointer is placed on a data point in the report, a tooltip provides more
information about the specific data item. In this example, the user can see the exact number of incoming bits per packet at 11:55 AM on March 31, 2010.

Display 2.29  Example of an Interactive ActiveX Report

Sorting Reports in the Table View
The column headings of the Table view enable you to sort the reports by column. The default order is alphanumeric ascending order by report title, BY variable, and report creation date.

When you click a column heading in the Table view, 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 icon (▼) 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. However, the Thumbnail View and Flow view use the same sort order that you specified in the Table view for the current instance of viewing the gallery.

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.

Thumbnail View

About the Thumbnail View
The Thumbnail view displays reports as expandable tiles or thumbnail images that you can view and arrange. This view displays up to nine thumbnails of reports at one time.
Each thumbnail includes the report title, BY variables, a small image of the report, and sizing icons that enable you to increase or decrease the size of the image in the Gallery pane.

The following image shows reports in the Thumbnail view of the Gallery pane:

**Display 2.30  Thumbnail View of Reports in the Gallery Pane**

In the Thumbnail view, you can click the arrow next to the Action button and select Copy to Favorites to copy the selected reports into one of your Favorites folders. For more information about Favorites, see “Working with Favorites” on page 47.

**Viewing Reports in the Thumbnail View**

Click the Thumbnail view icon ( ) in the Gallery pane to view the gallery reports in this format. This format enables you to view small images of each report in a gallery.

You can double-click a report thumbnail to open a large version of the report in a separate browser window. If the report was created in an ActiveX or Java format, then you can place the mouse pointer on an area in the expanded report to view more layers of the report data.

*Note:* ActiveX is supported only on Internet Explorer.

You can also use the following icons at the top right of each report thumbnail to minimize and expand the thumbnail images:

- Click this icon to minimize the thumbnail. A single title bar for the report appears at the bottom of the Gallery pane. Click the title bar for the report at the bottom of the pane to reopen the thumbnail.
Click this icon to expand the thumbnail to the full size of the Gallery pane.

Click this icon to shrink an expanded thumbnail back to its original size.

**TIP** If the gallery contains more than nine reports, then you can use the vertical scroll bar to navigate through the entire set of reports that are in the gallery. Place the mouse pointer on the scroll bar to see the number of reports that are in the Gallery pane and the set of reports that are currently displayed. For example, if you are viewing the first set of reports in a gallery that includes 124 reports, then the tooltip states 0–9 out of 124.

### Sorting Reports in the Thumbnail View

The Thumbnail view uses the same sort order that is designated in the Table view. You can sort the order of reports in the Table view and then view them in that order in the Thumbnail view. For more information, see “Sorting Reports in the Table View” on page 42.

You can reorder the reports in the Thumbnail view by dragging and dropping a thumbnail onto a new location in the thumbnail grid. However, the order that you designate is not preserved the next time you access the gallery. In addition, the Table View and Flow view do not automatically use the same order that you specify in the Thumbnail view.

### Flow View

**About the Flow View**

The Flow view displays a horizontal stack of up to ten reports at one time. Each report image includes the report title and BY variables.

The following image shows reports in the Flow view of the Gallery pane:

**Display 2.31 Flow View of Reports in the Gallery Pane**

![Image of the Flow View of Reports in the Gallery Pane](image-url)
In the Flow view, you can click the arrow next to the Action button and select Copy to Favorites to copy the center report into a Favorites folder that you select. For more information about Favorites, see “Working with Favorites” on page 47.

**Viewing Reports in the Flow View**

Click the Flow view icon (¶) in the Gallery pane to view the gallery reports in this format. This view displays stacks of ten reports at one time. You can navigate between the first and last report in a stack 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 the next report into the center.
- Click a report on the left to move the previous 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 move to the previous or next set of ten reports.

*Note:* Place the mouse pointer on the horizontal scroll bar to see the number of reports that are in the Gallery pane and the set of reports that are currently displayed. For example, if you are viewing the first stack of reports in a gallery that includes 124 reports, then the tooltip states 0–10 out of 124.

**Sorting Reports in the Flow View**

The Flow view uses the same sort order that is designated in the Table view. You can sort the order of reports in the Table view and then view them in that order in the Flow view. For more information, see “Sorting Reports in the Table View” on page 42.

**Report Properties**

Gallery Manager enables you to view the properties of a report such as the name of the corresponding SAS Enterprise Guide project, the process flow, and the ITRM Gallery task that was used to create the report. Thus, you can use these properties to identify the report definition that is used to generate the SAS IT Resource Management report.

You cannot use Gallery Manager to modify these properties of a report. However, system administrators can use SAS Enterprise Guide and SAS IT Resource Management to modify the ITRM Gallery task, the report definition, and the report job to change the SAS IT Resource Management report. For more information, see “Part 3: Creating and Modifying Batch Reports” in *SAS IT Resource Management: Reporting Guide*.

To view the properties of a report using Gallery Manager, perform the following steps:

1. In the Gallery pane, select a report. If you are using the Flow view, then the report in the center of the pane is the selected report.

2. In the Gallery pane, click the arrow next to the Action button and select Report Properties. The Report Properties dialog box appears for the selected report.
The following display provides an example of a Report Properties dialog box for a sample report.

Display 2.32 Report Properties for a Sample Report

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>SampleReports</td>
</tr>
<tr>
<td>Process Flow</td>
<td>IBMISMSF_Various</td>
</tr>
<tr>
<td>Gallery Task</td>
<td>CpuBusyReportHourForTheDay</td>
</tr>
<tr>
<td>Report Title</td>
<td>System CPU Busy Percent and Hardware Mips by Engine Type</td>
</tr>
<tr>
<td>Domain Category</td>
<td>IBMISMSF_RWFSys</td>
</tr>
<tr>
<td>Schedule Frequency</td>
<td>Day</td>
</tr>
<tr>
<td>Keywords</td>
<td>CPU</td>
</tr>
<tr>
<td>Date</td>
<td>April 2, 2010 12:00:00 AM</td>
</tr>
<tr>
<td>DayOfWeek</td>
<td>Fri</td>
</tr>
<tr>
<td>Systype</td>
<td>DEVAPLEX</td>
</tr>
<tr>
<td>Machine</td>
<td>DEVA</td>
</tr>
<tr>
<td>Data Path</td>
<td>/SharedData/SAS IT Resource Management/IT Data Mart/RFMForReporting/IBMISMSF 1/Domain Categories/RWF System</td>
</tr>
<tr>
<td>Report Author</td>
<td>Supplied</td>
</tr>
<tr>
<td>Expires After</td>
<td>300</td>
</tr>
</tbody>
</table>

The properties that are in the Report Properties dialog box vary based on the report and its metadata. The information for a given report might include a combination of the following properties:

**Project**
- provides the name of the SAS Enterprise Guide project that is associated with the report. The SAS Enterprise Guide project includes the ITRM Gallery task that creates the report definition for the report.

**Process Flow**
- provides the page of the SAS Enterprise Guide project that is associated with the report. This page of the SAS Enterprise Guide project includes the ITRM Gallery task that creates the report definition for the report.

**Gallery Task**
- provides the name of the ITRM Gallery task that creates the report definition for the report. The ITRM Gallery task name is the same as the report definition name.

**Report Title**
- provides the name of the report.

**Domain Category**
- provides the domain category of the adapter of the report. This value enables you to filter the report by domain category in Gallery Manager. This value in the report definition is specified in the ITRM Gallery task.

**Domain Subcategory**
- provides the report category, a subset of the domain category, for the report. This value enables you to filter the report by domain subcategory in the Gallery Manager. This value in the report definition is specified in the ITRM Gallery task.

**Schedule Frequency**
- indicates when the report should be scheduled to run. This value in the report definition is specified in the ITRM Gallery task.

*Note:* This value is a report filter in metadata only. It does not schedule the corresponding report job and therefore does not guarantee that the job is actually...
run on this schedule. This value simply enables you to subset the report by the given job schedule frequency in the Gallery Manager.

**Keywords**

provides the keywords that are assigned to the report for filtering in the Gallery Manager. Keywords are values in the report definition and are specified in the ITRM Gallery task.

Additional BY variables (such as Date or Machine) provide other BY variables that are in the report. Gallery Manager enables you to filter reports by these BY variables. A report can include zero or more BY variables in the Report Properties dialog box.

**Data Source**

provides the name of the information map for the report.

**Data Path**

provides the location of the information map for the report. If this report property is blank, then the corresponding report job used the information map in the same folder as the report job. This value is a parameter of the report definition and can be specified in the ITRM Gallery task.

**Report Author**

provides the user ID that created the corresponding ITRM Gallery task in SAS Enterprise Guide. Supplied indicates that the resulting report definition was supplied by SAS IT Resource Management.

**Expire After**

indicates the number of days, according to the report definition, that the report is saved on the SAS Content Server until it expires and can then be overwritten when the report job is run again. This value in the report definition is specified in the ITRM Gallery task.

If a report is expired and its report job is run again, then the expired report is deleted and replaced with the new report. If a report is not expired and its report job is run again, then the previous report remains in the system with the new report that is generated.

*Note:* The Gallery transformation in the report job can be set to ignore the ExpireAfter value in the report definition and use a different value to calculate the expiration date for a report. For more information about specifying parameters in the Gallery transformation, see the Help for SAS IT Resource Management or “Working with Gallery Transformations” in the *SAS IT Resource Management: Reporting Guide*.

**Report URL**

specifies the Web address of the physical report file that is on the SAS Content Server.

---

**Working with Favorites**

**Overview**

SAS IT Resource Management reports have expiration dates that specify if a report should be overwritten when the associated report job is run within a given time frame. This prevents the SAS Content Server from storing too many reports over time.
The Favorites pane enables you to save a copy of a report if you do not want to lose the data when the report is overwritten. You can copy reports from one or more galleries and save the copies indefinitely in Favorites folders until you delete the copies manually. You might use Favorites to copy and save reports that show unique data trends, information that you want to refer to later, remarkable data points, or information that you want to save and e-mail to others.

In the Favorites pane, you can perform the following tasks:

- Create Favorites folders.
- Copy reports from the Gallery pane into a Favorites folder.
- Navigate and open Favorites folders to view your favorite reports in the Gallery pane.
- Manage Favorites folders and reports.
- E-mail your favorite reports.

The report copies that you save in Favorites folders are stored in a user-specific location of the SAS Content Server and are not updated when the associated report jobs run again. You can view these reports in the Gallery pane.

In the following image, the Favorites folder HighUsageCriticalServersOct2010 is open in the Gallery pane and the three reports in that folder are displayed:

**Display 2.33  A Favorites Folder in the Gallery Pane**

![A Favorites Folder in the Gallery Pane](image)

**Create a Favorites Folder**

Each report in the Favorites pane must be stored in a Favorites folder. Thus, you must create one or more Favorites folders before you can copy a report into the Favorites pane. The **Action** button in the Favorites pane enables you to perform this task.

Your Favorites folders and reports are saved for your user ID in user-specific folders on the SAS Content Server. You can use the **E-mail Reports** action to share these reports with others.

For best results, create a set of Favorites folders that clearly identifies the notable attributes of the reports that they store. For example, a Favorites folder titled **HighUsageCriticalServersOct2010** might be used to keep notable reports that show high usage on critical servers within your enterprise during the month of October 2010.

To create a favorite folder, perform the following steps:

1. In the Favorites pane, click the arrow next to the **Action** button and select **New Folder** to display the New Favorites Folder dialog box.
The New Favorites Folder dialog box appears.

Display 2.34  New Favorites Folder Dialog Box

2. In the Name field, enter a unique name for the folder. The name of a Favorites folder is limited to 50 characters and cannot include spaces or the special characters / \ * : or ".

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

4. Click Save to create the new folder or Cancel to close the dialog box.

Copy a Report to a Favorite Folder

To copy a report to a Favorites folder, perform the following steps:

1. In the Browse or Gallery pane, locate and open the gallery that includes the report that you want to copy and save as a favorite.

2. In the Favorites pane, select the Favorites folder where you want to save the report.

3. In the Gallery pane, select the report that you want to copy and save to your Favorites folder.
   - In the Table view, click a report to select it. To select multiple reports at one time, hold down the CTRL or SHIFT key and click multiple reports.
   - In the Thumbnail view, click a report to select it.
   - In the Flow view, position a report to the center of the Gallery pane to select it.
   
   **Tip:** You can drag and drop reports from the Table view to a Favorites folder and skip the remaining steps.

   **Note:** Gallery Manager enables you to select and copy no more than 40 reports at one time.

4. In the Gallery pane, click the arrow next to the Action button and select Copy to Favorites. The selected report or reports are added to the Favorites folder that you selected.

View Reports in a Favorites Folder

To view the reports in a Favorites folder, perform the following steps:

1. In the Favorites pane, select a Favorites folder.

2. Click the arrow next to a Favorites folder to expand the folder and view a list of the reports that it contains.
3. Click a report in the Favorites pane to view a thumbnail of the report. The following image shows a thumbnail of the Workload CPU Mips report in the Favorites folder **HighUsageCriticalServersOct2010**.

*Display 2.35  Thumbnail Image of a Report in a Favorites Folder*

![Thumbnail Image of a Report in a Favorites Folder]

4. Double-click the report icon ( ) in the Favorites pane to view a large version of the report in a separate browser window.

*Tip* To see Favorites reports in the Gallery pane, select a Favorites folder, click the arrow next to the **Action** button in the Favorites pane, and then select **Open**. You can use the **View** icons in the Gallery pane to view the reports in the format that you prefer.

**Modify a Favorite Folder**

You can modify any of the Favorites folders that you create. To modify a Favorites folder, perform the following steps:

1. In the Favorites pane, select the Favorites folder that you want to modify.
2. In the Favorites pane, click the arrow next to the **Action** button and select **Modify**. The Edit Favorites Folder dialog box appears.

*Display 2.36  Edit Favorites Folder Dialog Box*

![Edit Favorites Folder Dialog Box]

3. Modify the name and description of the Favorites folder as needed. The name of a Favorites folder is limited to 50 characters and cannot include spaces or the special characters / \ * : or ".
4. Click **Save** to save your changes or **Cancel** to close the dialog box.

### Delete Favorites Folders or Reports

You can delete a Favorites folder to remove it and its contents from the Gallery Manager. You can also delete an individual report from a Favorites folder. However, these actions do not delete the original reports from the SAS Content Server because the reports in Favorites folders are copies.

To delete Favorites folders or reports, perform the following steps:

1. Select one or more Favorites folders or reports that you want to delete. You can hold down the CTRL or SHIFT key and select multiple items in the Favorites pane.

2. In the Favorites pane, click the arrow next to the **Action** button and select **Delete**.
   
   **Note:** You can select **Delete All** to delete all the Favorites folders and reports in the Favorites pane.

3. Click **Yes** to confirm that you want to delete.

### E-mail Reports

Gallery Manager enables you to e-mail reports that are stored in a Favorites folder. This enables you to share interesting or notable reports with other colleagues for evaluation, analysis, or review.

The e-mails that Gallery Manager generates include links to the selected report copies that are saved on the SAS Content Server. Therefore, the option to send reports via e-mail is successful only when sharing reports with other individuals within your enterprise that have network permissions to access the SAS Content Server.

**Note:** You must have a default mail client configured on your client machine to perform this action.

To e-mail a report that is in a Favorites folder, perform the following steps:

1. In the Favorites pane, select one or more reports that you want to e-mail.
   
   **Note:** Gallery Manager does not enable you to send a Favorites folder. If you want to send all of the reports in a Favorites folder, you must select all of the reports in the folder manually.

2. In the Favorites pane, click the arrow next to the **Action** button and select **E-mail Reports**. Your e-mail client opens a new message. In the body of the message, the e-mail includes links to the SAS Content Server location where the reports are saved.
   
   **Note:** The links in the e-mail point to the report copies that were created when you saved the reports as favorites. Thus, similar to all reports in Favorites folders, the linked reports are not updated if the corresponding report jobs are run again.

3. In the **To** field of the new e-mail message, enter the e-mail addresses of the people to whom you are sending the reports.
The following example is an e-mail that Gallery Manager created for a favorite report.

**Display 2.37  Sample E-mail with a Link to a Favorite Report**

4. Click **Send**.

**Note:** E-mail clients might not be able to handle very large content. If you try to e-mail ten or more reports at once, then a message appears with instructions to reduce the number of selected reports. If you want to send more reports, then you must send multiple e-mails of fewer than ten reports each.
Chapter 3

Gallery Manager Sample Reports and Troubleshooting

Sample Reports

During the SAS IT Resource Management installation, several sample reports are saved on your SAS Content Server. These reports provide an example of the different types of reports that SAS IT Resource Management can create. They also enable you to practice using Gallery Manager before you have generated your own reports.

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

1. Open Gallery Manager.
2. In the Browse pane, click the arrow next to the Action button and select New Gallery.
3. Enter a Name and Description for the new gallery.
4. Click Next.
5. Click the arrow next to Keywords to expand the folder.
6. Select ITRMDomainIntelligence and click the right arrow to move this selection to the Selected Items list.

   Note: All sample reports include the keyword ITRMDomainIntelligence. If this keyword does not appear as an available option in your Gallery Manager session, then the sample reports are no longer on your SAS Content Server. Contact your systems administrator for assistance.
7. Click Finish to create the gallery.
Troubleshooting Gallery Manager

Using Two Open Sessions of Gallery Manager on a Single Workstation

Several Web browsers support a feature that merges multiple open sessions. This feature shares cookies, log on credentials, and preferences among all open sessions of the browser. If your workstation has multiple sessions of Gallery Manager open with different log on credentials, then the actions that you perform in one session might affect what you see in the other open sessions.

To open separate sessions on your workstation using different log on credentials, you can disable the session merge feature on your Web browser. See your Web browser documentation for instructions to open separate sessions that do not share cookies or preferences.

Next Button Is Disabled in the Create Gallery Wizard

If you press TAB to move your cursor through the options in the Create Gallery wizard, then the Next button might be disabled after you have cycled through the options on a page more than once. To re-enable the Next button, click on the wizard page listed in the Steps box on the left of the page.
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