



SysAid™

Manager Portal

September, 2006

SysAid Manager Portal



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I PREFACE

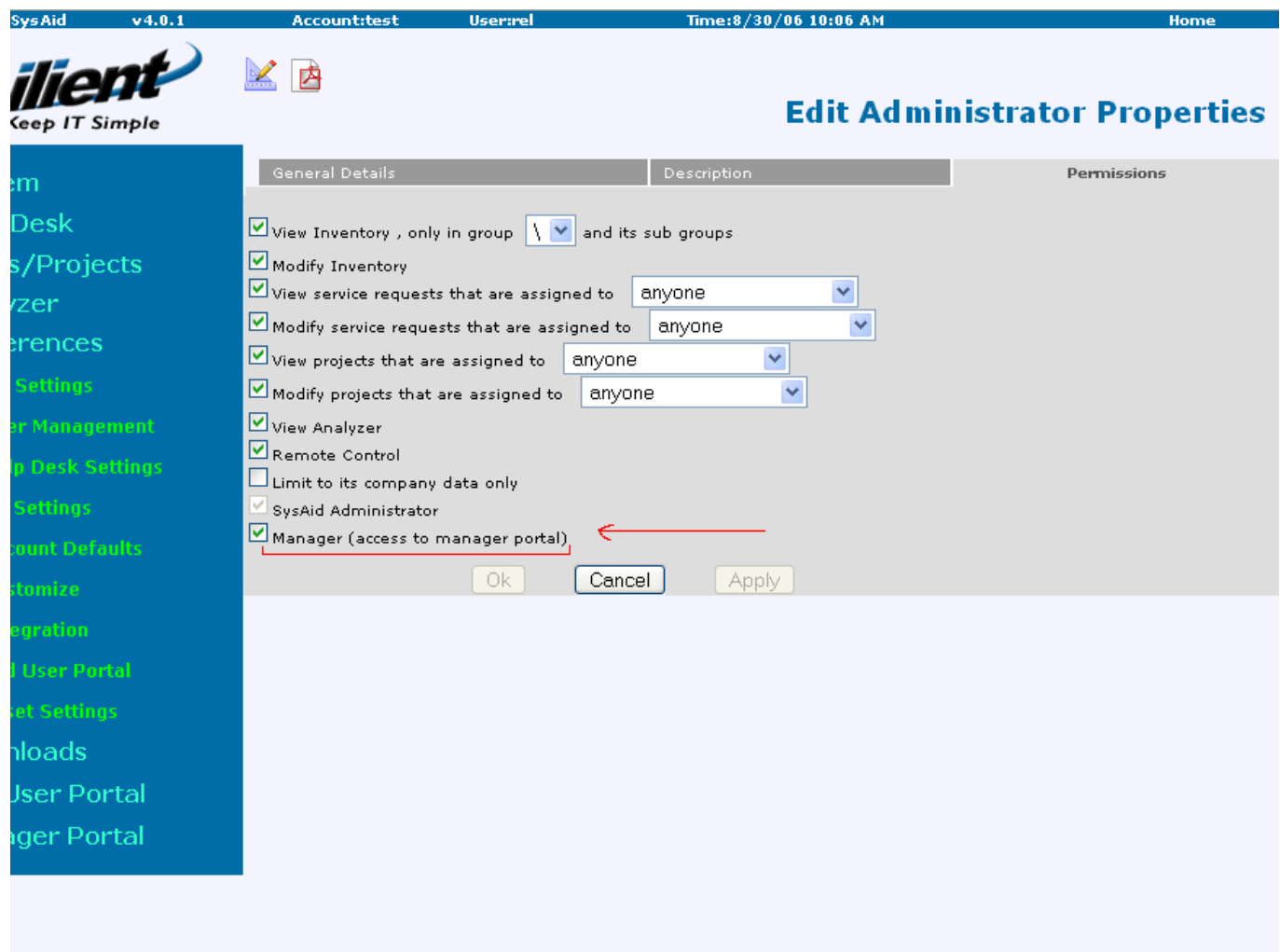
The **Manager Portal** is a new module in SysAid, which provides a full suite of reporting features. In the **Manager Portal** the user can take advantage of standard reporting features or customize entirely his/her own reports.

If you have the full version no. 4.0.1 and up of SysAid, you were already given one free manager license. To purchase additional manager licenses, please contact Ilient.

II USER PERMISSIONS

Before a user can gain access to the Manager Portal, he/she should have had his permission authorized in **Preferences > User Management**, in the Administrator's interface. Click on the row entry which displays the details of the user whom you wish to allow access to the Manager Portal. Then, go to **General Details > Permissions**. Choose to enable access to the Manager Portal at the appropriate check box.

Figure 1: Manager Permission



The screenshot shows the SysAid Administrator interface. At the top, there is a status bar with the following information: SysAid v4.0.1, Account:test, User:rel, Time:8/30/06 10:06 AM, and Home. Below the status bar is the ilient logo and the text 'Keep IT Simple'. The main content area is titled 'Edit Administrator Properties' and is divided into three tabs: 'General Details', 'Description', and 'Permissions'. The 'Permissions' tab is active, showing a list of permissions with checkboxes. The 'Manager (access to manager portal)' checkbox is checked and highlighted with a red box and a red arrow pointing to it. Other permissions include 'View Inventory', 'Modify Inventory', 'View service requests', 'Modify service requests', 'View projects', 'Modify projects', 'View Analyzer', 'Remote Control', 'Limit to its company data only', and 'SysAid Administrator'. At the bottom of the dialog box are 'Ok', 'Cancel', and 'Apply' buttons.



III ENTERING THE MANAGER PORTAL

To enter the **Manager Portal** interface, login to SysAid and in the sidebar menu click on the last option, **Manager Portal** (Figure 2).

Figure 2: Welcome page



From the **Manager Portal** Console, you can re-enter the Administrator's interface at any time. Simply click the **Administrator** link on the left sidebar menu.

IV SIMPLE OVERVIEW OF THE MANAGER PORTAL MENU OPTIONS

Here we will describe the main menu options available.

There are seven active menu links in the left sidebar menu: Dashboard, Reports, Scheduler, Design Dashboard, Design Reports, Administrator, and Logout.

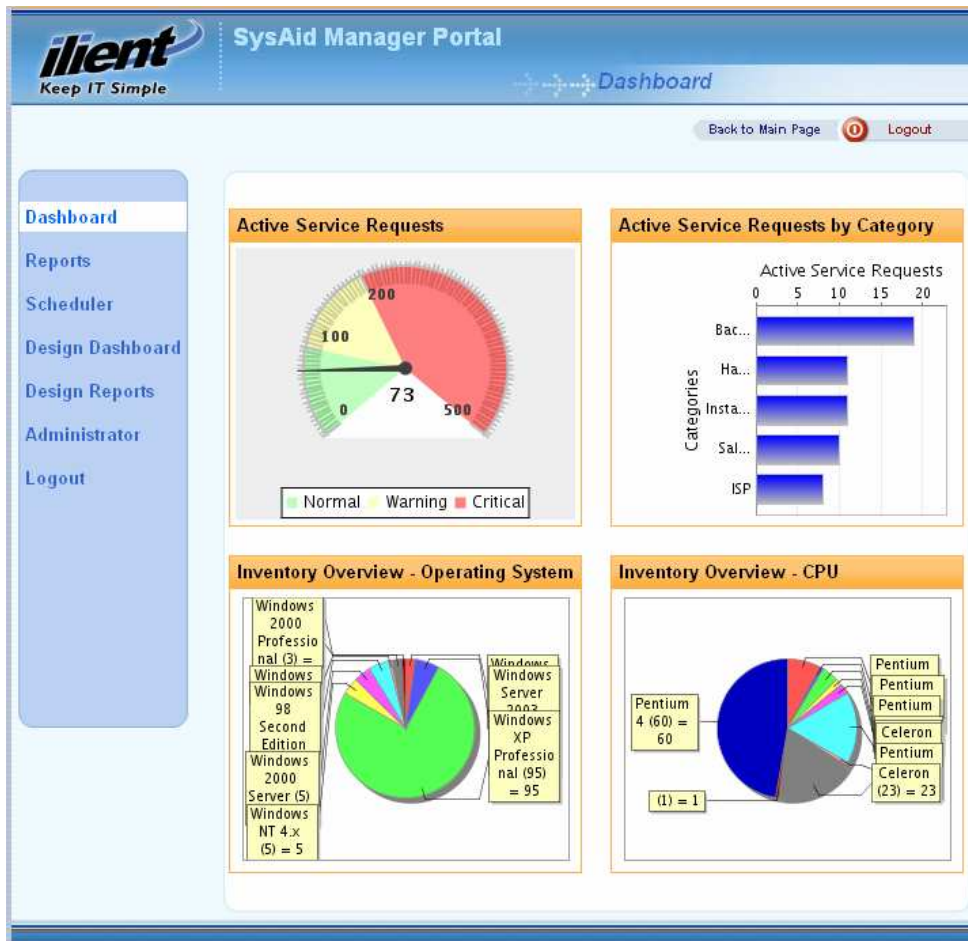
1. Dashboard

The **Dashboard** page (Figure 3) is the default page opened when you enter the **Manager Portal** console.

1. A. Dashboard Charts

The Dashboard is the place where you can review graphically summaries of your report outcomes. To set up what you see in the Dashboard go to **Design Dashboard**.

Figure 3: Manager Portal – Dashboard Interface



1. B. Links to Similar Reports

Some of the charts in the dashboard display similar data to the data which particular reports contain. For instance, the **Active SRs by Category** chart is a parallel of the report that is called **Active Requests**.



This report can be accessed through the **Repots** link in the left sidebar menu. The **Reports** link will be elaborated on later.

If you click one of the four charts displayed on the dashboard screen, a pop up box with the parameters of the equivalent report will open.

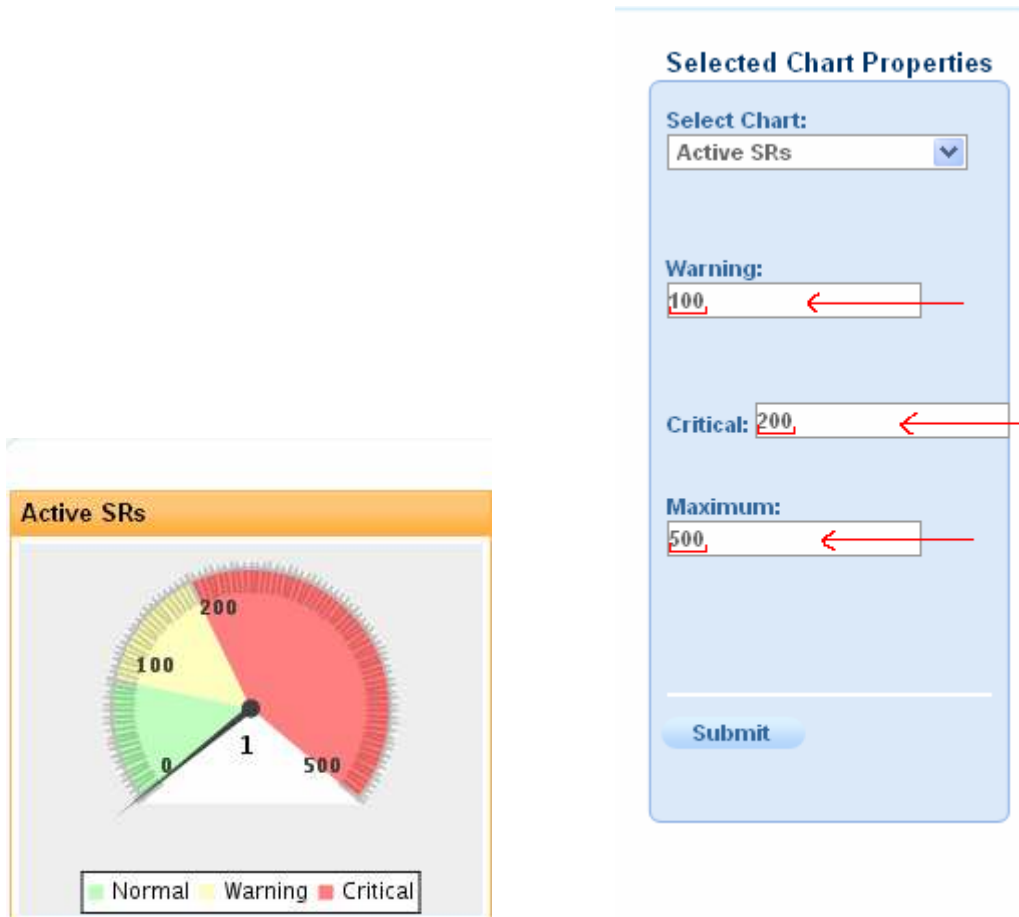
2. Design Dashboard

Clicking the **Design Dashboard** link in the left sidebar menu, will bring you to the **Design Dashboard** page. Four minimized graphical presentation of report results can be selected from the **Design Dashboard**.

1. Click one of the four charts presented on your screen.
2. On the **Select Chart Properties** box, located on the right, click on the **Select Chart** drop down menu, and select a chart to display and to design.
3. Depending upon your selection other additional input boxes, check boxes or drop down boxes will appear.

For example, if you chose to design the Active SRs chart, you will be able to change the values for the number of active service requests that appear in each level of urgency: normal, warning and critical, represented in the chart by the colors green, yellow and red (Figure 4).

Figure 4: Dashboard Design- Example-Active SRs Chart



As you see in Figure 4, the default values are 100 service requests under the warning urgency level, 200 requests under the critical urgency level, and a total of 500 active requests that will appear in the chart. These values can be modified, according to your needs.

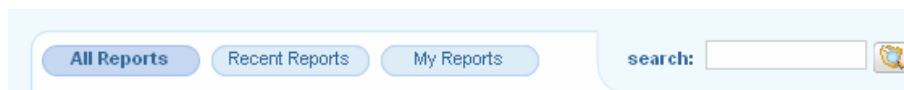
4. Finally click the **Submit** button and the four updated charts will appear on the **Dashboard** screen.

3. Reports

3. A. Horizontal Menu Bar

Clicking the **Reports** link in the left sidebar menu will lead you to the **Report** screen. On this screen you will notice the top horizontal menu bar.

Figure 5: Reports- Horizontal menu bar



Here you can choose to view all the existing reports, the reports you have saved, or the last ten reports you ran. These can be accessed via the **All Reports**, **Recent Reports** and **My Reports** buttons. You can also search for a specific report by inserting the name of the report in the search box, and clicking the icon on the right side.

3. B. Recent reports

The manager portal will save recently run reports and automatically list the last ten reports you ran. They can be accessed by clicking on the **Recent Reports** button.

3. C. My Reports

You can save particular reports that are most relevant to you, and access them by clicking on this button.

3. D. Running Standard Reports

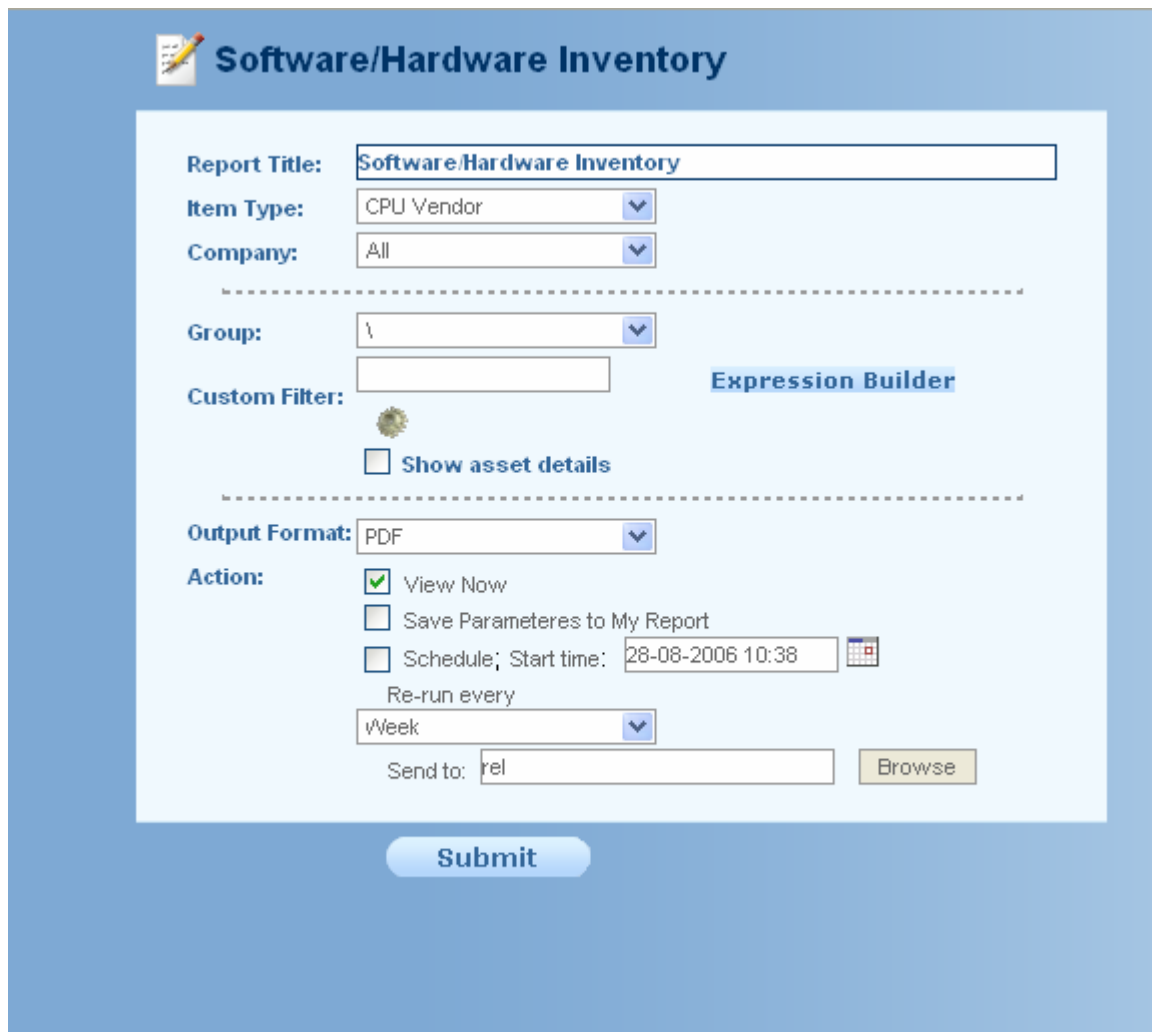
The Manager Portal contains three standard folders.

- Help Desk
 - Workload
 - Service quality
- Inventory
- Highest Values Reports

These folders and standard reports are built into the **SysAid Manager Portal**, and cannot be deleted. They can, however, be made invisible for the **Reports** page, if you choose to disable the **Visible** box in the **Design Report** page, which is elaborated on later in this guide.

To simply run a ready report, first expand the file tree by clicking on the plus sign (+). Click on the name of a report you wish to run, for example **Active Requests**. A list of the reports titles and available parameters is tabulated in the Appendix. A new pop-up screen will open (Figure 6); in this screen all of the parameters available for running your report are presented. Make your selection.

Figure 6: Report parameters



The screenshot shows a web interface for configuring a report. The title is "Software/Hardware Inventory". The form includes the following fields and options:

- Report Title:** Software/Hardware Inventory
- Item Type:** CPU Vendor
- Company:** All
- Group:** \
- Custom Filter:** An empty text box with an "Expression Builder" button to its right.
- Show asset details
- Output Format:** PDF
- Action:**
 - View Now
 - Save Parameters to My Report
 - Schedule; Start time: 28-08-2006 10:38 (with a calendar icon)
- Re-run every: Week
- Send to: rel (with a "Browse" button)

A "Submit" button is located at the bottom of the form.

3. E. Report Parameters

For every report there is a certain set of parameters to choose from when building your report. The **Appendix** lists the parameters available in each standard report.



Here is a description of some of the parameters that can be selected for specific reports:

3. E. i. Group

Attributing the report to a particular group helps you organize your reports and divide them into different folders.

3. E. ii. Expression Builder

If you click the Expression Builder button, or the custom filter icon, you will be able to build an expression to filter the chosen report for specific data. Building the filter here is very similar to building a filter for a list in SysAid Administrator's interface.

Figure 7: Expression Builder

Active Requests

Report Title:

Category Filter:

Company:

Asset Group:

Custom Filter:

Group Selection:

Date:
From Date: To Date:

Output Format:

Action: View Now
 Save Parameters to My Report
 Schedule; Start time:
Re-run every

Send to:

For your filter, choose between creating a simple “statement”, an “and” expression, or an “or” expression. A simple statement includes an element (such as “priority”), an operator (such as “equals”), and a value (such as “urgent”). The above example would be relevant to the **Active SRs** report, for instance, and will allow only service requests with an urgent priority.



You can also create and/or expressions, connecting simple statements using Boolean logic.

If statements are connected by an "and", both must be true for the result to be returned. If an "or" connects them, one or both must be true.

3. E. iii. My Reports - Saving Your Customized Reports

If you selected **Save Parameters to My Reports** in the Report Parameters window, this report setup will be automatically saved under **My Reports** tab, located horizontally on top of the **Reports** screen.

3. E. iv. Scheduler

Schedule a time for the report to run. Check the box **Schedule** and choose a Start time. Then choose the frequency of the scheduler in the drop down menu (either every Day, every Week or Month).

Here you can also choose the users that will receive the report. Each time SysAid will re-run the report, it will be sent automatically to the users you have chosen. In case there is no data to report, a message will be sent to the chosen user/s nevertheless, stating the fact that there is no data to report. Browse for the name of the user/users you wish to send the report to from the list of users in the Administrator's interface.

4. Design Reports

From the **Design Reports** interface you can modify the file tree, add more reports, change names and delete reports (Figure 8).

Figure 8: Design Reports interface



4. A. To modify a report

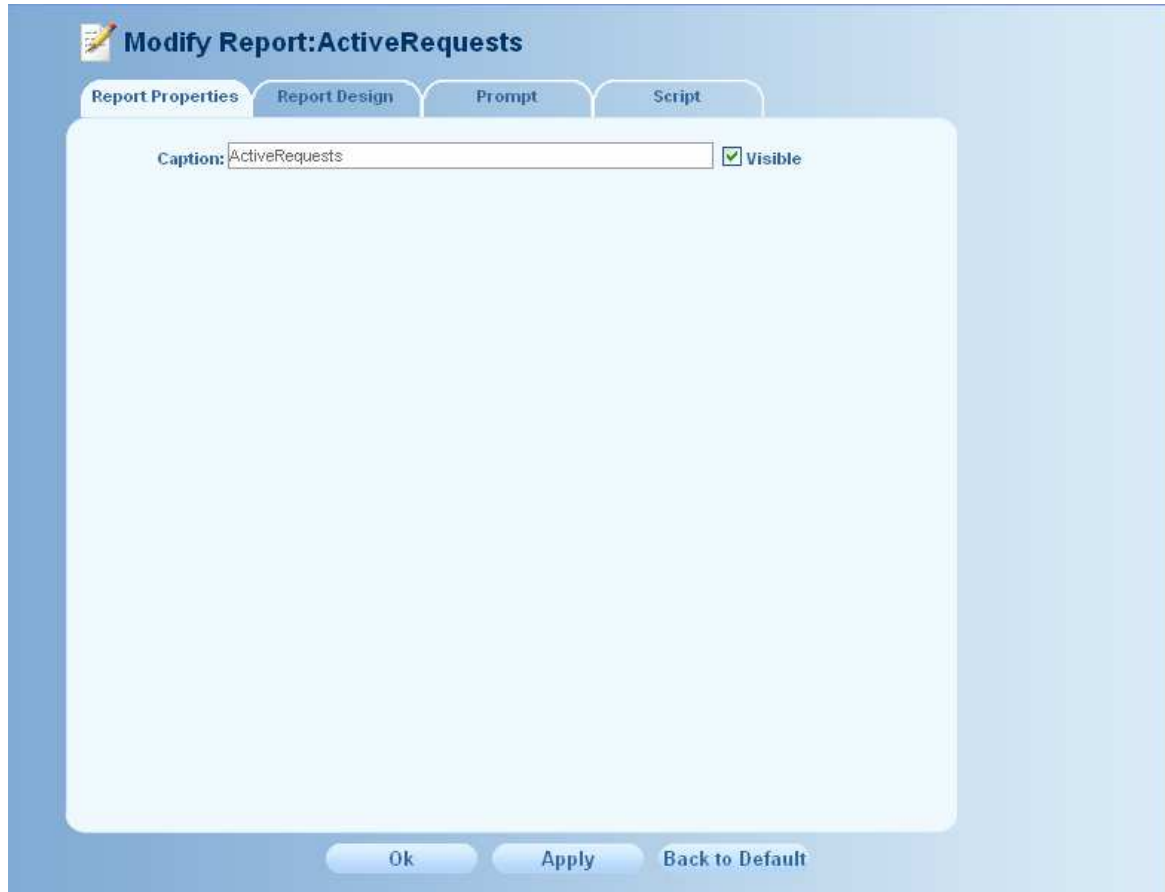
1. Click the report you wish to modify.
2. Select the **Modify Report** icon in the action box.
3. A pop up screen called **Modify Report** will open (Figure 9). Here you can modify the four elements of a report: its properties; design; prompt and script.

4. A. i. Modify Report: Report Properties Tab

Under the **Report Properties** tab in the **Modify Report** pop up screen, you can re-name a report, and render a report invisible.

1. Change the report name – in the caption box you can change the name of the report. Enable the **Visible** box to show it in the reports file tree.
2. To render a report invisible in the **Reports** page, choose the report you want to render invisible, and then click the **Modify Report** button in the Action box on the right. The **Modify Report** pop up box will open. Under the **Report Properties** tab, disable the **Visible** check box. This will render the report invisible.

Figure 9: Modify Report pop up screen





Note: Some of the features in the following section may require computer programming abilities. Therefore, we recommend that only users with sufficient programming skills will engage in modifying the reports as described below.

4. A. ii. Modify Report: Prompt Tab

Under this tab you can find a box called **Edit Prompt Text** (Figure 10), which contains the code that designs the parameters in the Report Parameters pop up screen (Figure 6).

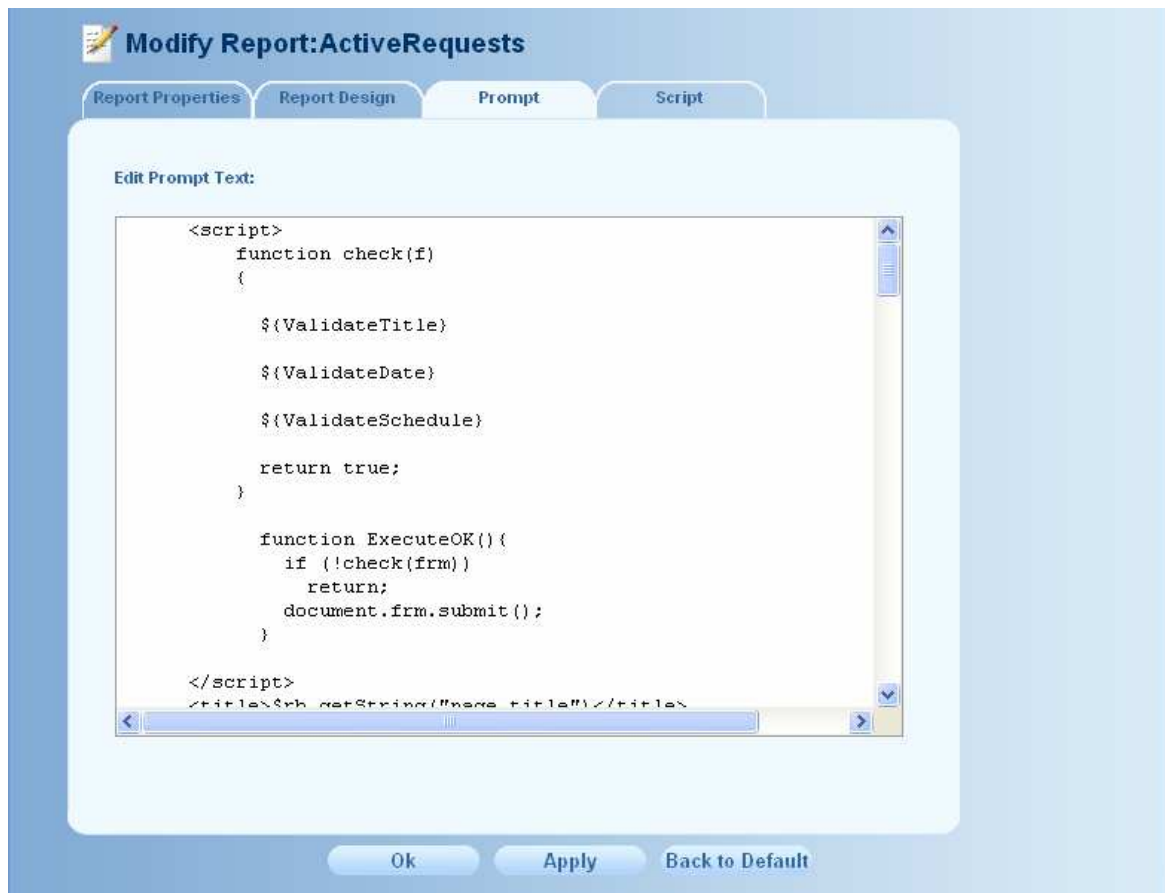
Here you can edit the Report Parameter window, add or delete parameters and categories, or change the design and the title of the window itself.

The prompt text is written in HTML and velocity code. The different parameters are presented by tags. A **Manager Portal** user can edit this code, if he/she is familiar with it, of course. Finally, changes in the prompt code can be saved by clicking **Ok**.

To learn more about Velocity code, you may consult the following web page:

- <http://jakarta.apache.org/velocity/>

Figure 10: Prompt screen



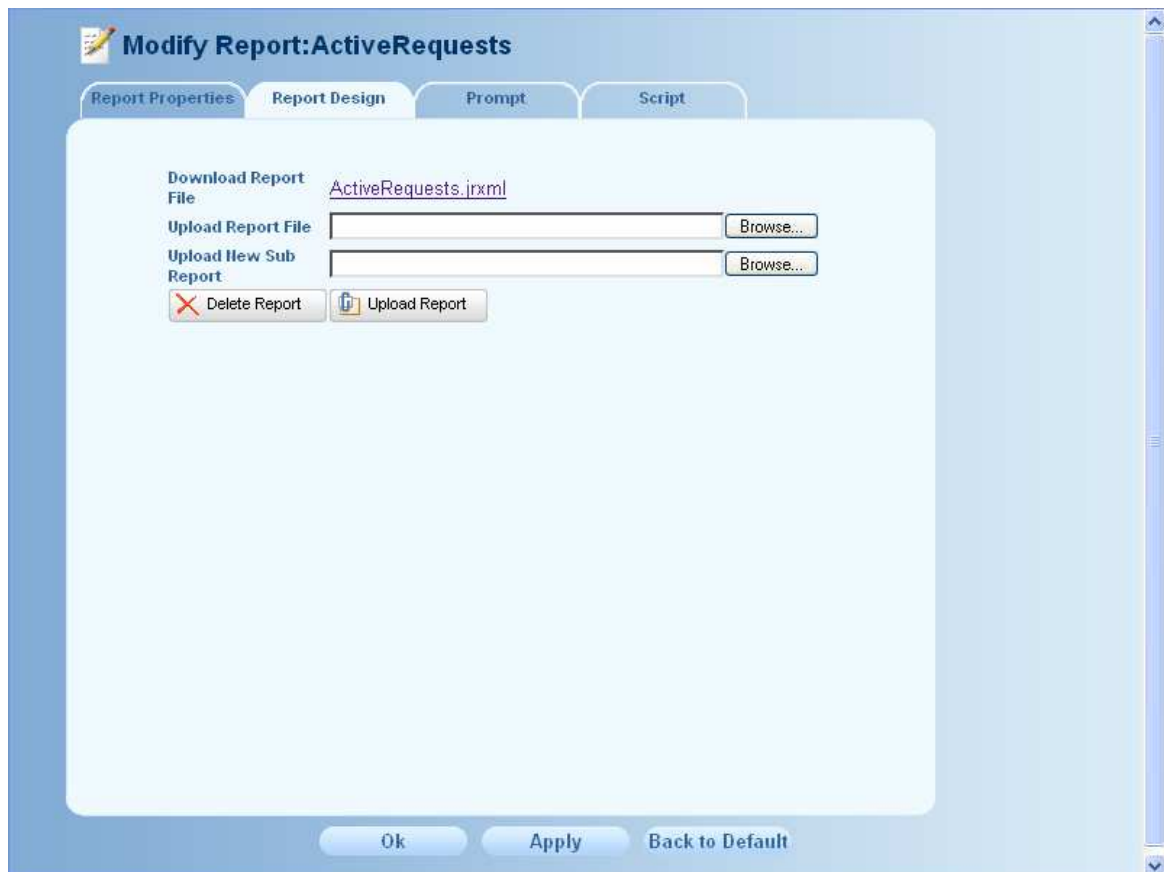
4. A. iii. Modify Report: Report Design Tab

Click the **Report Design** tab (Figure 11). Here you can change and customize the report output. Header, footers, report title and sub-titles can be edited here, by using the program iReport 1.2.3. You can download it here:

<http://jasperforge.org/sf/projects/ireport>

Alternatively, you can edit the report manually with a text editor, or with Notepad.

Figure 11: Report Design screen

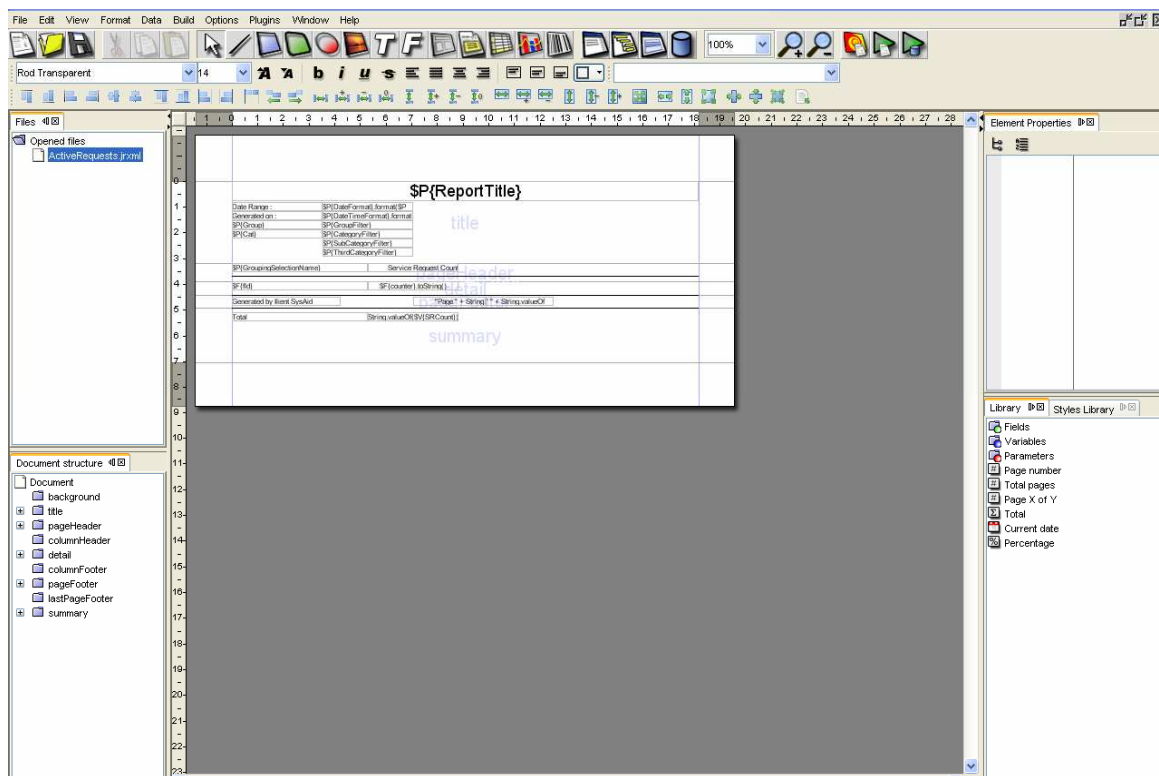


Customize a report layout based on a standard report- upload newly amended file

1. In **Design Reports** > click on the report name in the file tree.
2. Then click on the **Modify Report** button, positioned to the right of the screen, in the **Action** box.
3. Click on the **Report Design** tab. The Report Design screen will open.
4. First download the report file or sub report file you wish to edit. Click on the file name. Choose to open the file and make your

changes in iReport 1.2.3. (Figure 12) Then save them or save the report locally.

Figure 12: iReport 1.2.3.



5. Upload the file, click browse button next to the **Upload Report** File. Then click the **Upload Report** button at the bottom to complete.
6. Finally click Ok. The window will automatically close. Your new changes have been overwritten into the report file (.jrxml). Next time you run the report these changes will determine the report layout.



7. You can always choose to go back to the default design. Simply click the Back to Default button on the bottom of the Modify Report screen.

4. A. iv. Sub Reports

Under the report design tab, using the iReport 1.2.3, a report can sometimes be split and contain a sub-report part.

A sub report can contain extra design output or create more complex reports.

For instance, you may want to divide a report, such as **Open/Closed requests by Company** to Local companies and regional companies. For this purpose, the sub report option can be useful.

Tutorials of how to use iReport for sub reports can be found in the following address:

- http://www.jasperforge.org/images/stories/Documentation/ireports/swf/Subreport_viewlet_swf.htm
- http://www.jasperforge.org/images/stories/Documentation/ireports/subreport_tutorial.pdf

When this option is available you will see in the **Report Design** tab a **Sub Report1** option. Repeat steps 4, 5 and 6 above to edit the sub report.

4. A. v. Modify Report: Script Tab

Under this tab you can find a Groovy code that runs between **Prompt** and **Report Design** (Figure 13). A **Manager Portal** user can edit the script code him/herself, if they are familiar with Groovy code.

The data in the more complex reports needs to be processed prior to the designing of the report under the Report Design tab. The script enables to process this data.

For further information about Groovy code, you may consult the following web page:

- <http://groovy.codehaus.org>

Figure 13: Script screen



4. B. Create a New Report

Click on **Design Report** in the sidebar menu.

1. First click on the folder name where you want to create the new report.
2. Click on the **New Report** icon, located in the **Action** box. The **New Reports** option screen will open (Figure 14). Select a

- template type. Click **Save**. Then the **Modify Report** screen will appear and you should name or rename this report, then click **Ok**.
3. You can also choose to create a new report which is not based on a previous template by choosing the Empty Report check box.

Figure 14: New Report screen

New Report Options

select choose template report if you want to add a report that is bulid on previous one

Select: Empty Report choose template

Save **Close**

Preparing a new report based on an existing template can be very useful for many purposes. For example, you can add the logo of your company to a standard report in this fashion. However, we recommend that only users with the required programming skills will design new reports.

4. C. Modify Folder/Group

1. Click on the folder name.
2. Then click **Modify Folder** button in the Action box located to the right. A pop box will open called **Modify** Group (Figure 15).
3. Type the new name in the caption box, and click **Ok**.
4. You can also render a folder invisible, by disabling the **Visible** check box.

Figure 15: Modify Report screen



4. D. Create New Folders

To create a new folder, click on **Design Reports** in the sidebar menu. Click on the **New** folder. In the caption box, type the name of your new folder. A new folder will be inserted in to the file tree.

4. E. Delete

The **Manager Portal** includes standard reports, that is, reports that already exist in the module to begin with, and therefore cannot be deleted. These you can render invisible, by disabling the visibility option in the **Modify Report** screen.

Only reports that you have added yourself can be deleted. Simply choose the report you wish to delete, and click the **Delete** button in the action box.

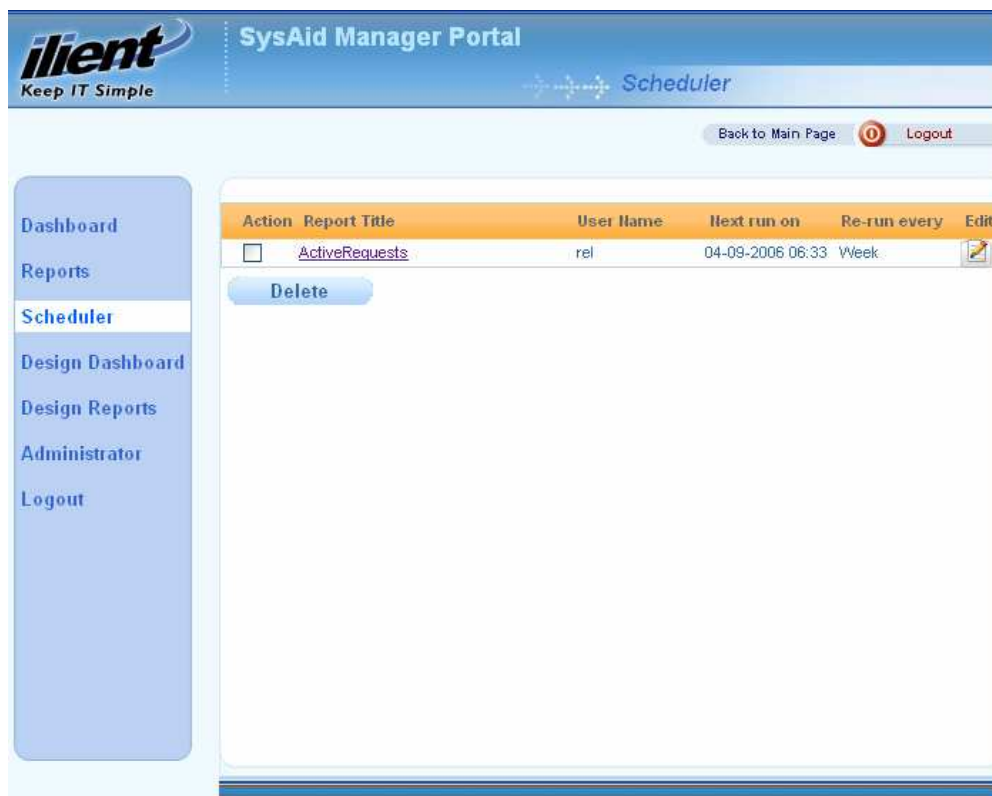
5. Scheduler

You can review when reports are set to run using the **Scheduler** (Figure 16). Details of when the report is set to run are provided. Click on **Scheduler** from the sidebar menu.

To change the data of when the report should run, click on the report title or on the Edit icon. The parameters set for that report will open. You also have the option to delete the schedule report run by enabling the **Action** box, then clicking on the **Delete** icon.

The user specified in the Scheduler table will receive the report via email on each re-run. In case the report does not contain any data, the user will receive an email message stating that there is no available data.

Figure 16: Scheduler



ilient SysAid Manager Portal
Keep IT Simple Scheduler

Back to Main Page Logout

Action	Report Title	User Name	Next run on	Re-run every	Edit
<input type="checkbox"/>	ActiveRequests	rel	04-09-2006 06:33	Week	

Delete

6. Logging out

To log out of the Manager Portal console, either click the Logout link located on the left sidebar menu, or use the Logout button at the top of your screen, to the right (Figure 17).

Figure 17: Logout Button



V APPENDIX

1. Help Desk/Workload Folder

Parameters

	Category Filter	Company Filter	Asset group Filter	Expression builder	Main grouping	Sub-grouping	User	Date
Active requests	X	X	X	X				
Open/Closed requests per period	X	X	X	X				
Open/Closed requests per category	X	X	X	X				
Open/Closed requests per company	X	X	X	X				
Open/Closed requests per	X	X	X	X				

	Category Filter	Company Filter	Asset group Filter	Expression builder	Main grouping	Sub-grouping	User	Date
admin								
Open/Closed requests per admin group	X	X	X	X				
Open/Closed requests per priority/urgency	X	X	X	X				
Help Desk activity summary		X			X	X		
Activities by administrator		X					X	X
Workload by administrator		X						X

2. Help Desk/Service Quality Folder

Parameters

	Category Filter	Company Filter	Expression builder	Main Grouping	Timer
Service Quality	X	X	X	X	
Service Quality by timer	X	X	X	X	
Service Breaches by category	X	X	X		X
Service Breaches by administrator		X	X		X
Service Breaches by company		X	X		X

3. Inventory Folder

Parameters

	Item type	Company filter	Expression builder	Group filter	Choose a single asset	Date	User	Show asset details
Software hardware inventory	X	X	X					X
Asset Details		X	X	X	X			
Asset changes by group		X		X		X		
Asset changes by date		X		X		X		
User Assets							X	
Software Products		X						
Catalog Items								X
Inventory Overview		X		X				

4. Highest Values Reports Folder

Parameters

	Category Filter	Company Filter	Timer	Expression builder	Number of Records	Date
Categories that contain the most SRs	X	X		X	X	X
Categories with the longest SRs time (average)	X	X	X	X	X	X
Categories with the longest SRs time (total)	X	X	X	X	X	X
Categories with the longest SRs activity time (total)	X	X		X	X	X
Categories with the longest SRs activity time (average)	X	X		X	X	X
Administrators	X	X		X	X	X

	Category Filter	Company Filter	Timer	Expression builder	Number of Records	Date
with the most SRs assigned to						
Administrators with the longest SRs time (average)	X	X	X	X	X	X
Administrators with the longest SRs time (total)	X	X	X	X	X	X
Administrators with the longest SRs activity time (total)	X	X		X	X	X
Administrators with longest SRs activity time (average)	X	X		X	X	X
Companies that submit the most SRs	X	X		X	X	X
Companies with the longest SRs time (average)	X	X	X	X	X	X
Companies with the longest SRs time (total)	X	X	X	X	X	X
Companies with the longest SRs activity time (total)	X	X		X	X	X
Companies with the longest SRs activity time (average)	X	X		X	X	X
End Users who submit the most SRs	X	X		X	X	X
End Users with the longest SRs time (average)	X	X	X	X	X	X
End Users with the longest SRs time (total)	X	X	X	X	X	X
End Users with the longest SRs activity time (total)	X	X		X	X	X
End Users with the longest SRs activity time (average)	X	X		X	X	X
Assets that were not updated	X	X		X	X	X



Output format is standard on all reports.