CIMS Lab, Inc.

CIMS Server

Web Reporting User's Guide

Version 4.1

CIMS Lab Publication Number: CS-WR-410-00

Published 04/08/05

Information in this guide is subject to change without notice and does not constitute a commitment on the part of CIMS Lab, Inc. It is supplied on an "as is" basis without any warranty of any kind, either explicit or implied. Information may be changed or updated in this guide at any time.

Copyright Information

CIMS is ©copyright 1974 - 2005 by CIMS Lab, Inc. and its subsidiaries. This guide is ©copyright 1974 - 2005 by CIMS Lab, Inc. and its subsidiaries and may not be reproduced in whole or in part, by any means, without the written permission of CIMS Lab, Inc. and its subsidiaries.

Names marked ™ or ® and other company and product names may be trademarks or registered trademarks of their respective vendors or organizations.

Mailing Address

CIMS Lab, Inc.
3013 Douglas Blvd., Suite 120
Roseville, CA 95661-3842

Table of Contents

Preface

1 • Getting Started

About CIMS Server Web Reporting 1-2

Types of CIMS Server Web Reporting Users 1-2

Starting CIMS Server Web Reporting 1-2

Logging On To CIMS Server Web Reporting 1-3

Using the Menu Bar 1-5

Changing Your Password 1-5

Logging Off 1-6

Viewing Online Help 1-6

Timing Out 1-6

Assigning CIMS Server Folder Security Permissions 1-7

2 • Running Reports

Introduction to Report Types 2-2

Running Reports 2-3

Using Report Parameters 2-4

About Account Codes 2-7

Example: Running a Report 2-8

Creating and Running CIMS Web User Created Reports 2-9

Creating or Updating a CIMS Web User Created Report 2-9

Running a Web User Created Report 2-10

Deleting a Web User Created Report 2-10

Example: Creating and Running a Web User Created Report 2-11

Creating and Viewing Published Reports 2-12

Publishing Reports 2-12

Viewing Published Reports 2-14

Example: Creating and Viewing a Published Report 2-16

3 • Working With Reports

Working With Reports **3-2**
About the Report Interface 3-2
Using the Reporting Toolbar 3-3
Navigating Using the Group Tree 3-4
Drilling Down in Reports 3-4
Publishing Reports 3-8
Saving Reports 3-8
Copying Text From a Report 3-8

Working With Spreadsheets **3-9**
About the Spreadsheet Interface 3-9
Publishing Spreadsheets 3-9
Opening a Spreadsheet in Excel 3-10
Working With Spreadsheets in Excel 3-10

4 • Running and Working With CIMS Advanced Spreadsheets

About CIMS Advanced Spreadsheets **4-2**

Running CIMS Advanced Spreadsheets **4-3**
Running a Drill Down or Static Advanced Spreadsheet 4-3
Running a Crosstab Advanced Spreadsheet 4-6

Working With CIMS Advanced Spreadsheets **4-8**
About the CIMS Advanced Spreadsheet Interface 4-8
Advanced Spreadsheet Column Description 4-9
Drilling Down in a Spreadsheet 4-10
Working With CIMS Advances Spreadsheets in Excel 4-12

Standard Advanced Spreadsheet Descriptions **4-14**
Complete Summary View 4-15
Summary By Account Code 4-18
Summary By Rate Code 4-21
Summary By Rate Group 4-24
Crosstab Spreadsheet 4-27

5 • Administering CIMS Server Web Reporting

Configuring User-Specific Settings **5-2**
Working With Favorite Reports 5-2
Showing or Hiding Folder Paths for Published Reports 5-5
Selecting an Account Code Structure for Reports 5-5
Choosing a Crystal Report Viewer 5-6
Changing Your E-mail Address 5-7
Resetting the Browser 5-7

Configuring System-Wide Settings **5-8**

Creating Custom Report and Transaction Parameters **5-11**
Creating Parameters Using ASP.NET 5-11
Creating Parameters Using Parameter Fields 5-11

Creating Custom Advanced Spreadsheets **5-12**
About the XML Spreadsheet Definition File Structure 5-13

6 • Using Transactions

Working With Transactions **6-2**
Adding Transactions 6-3
Editing Transactions 6-4
Deleting Transactions 6-4
Navigating Transactions 6-4

7 • Troubleshooting

Connection Problems **7-2**
Unable to connect to the CIMS Server Web Reporting Web site 7-2
The CIMS Server Web Reporting Web site is not opening properly 7-2

Log On Problems **7-2**
System will not accept user ID or password 7-2

Reporting Problems **7-3**
Error message appears when trying to run a spreadsheet or publish a report 7-3
Reports take a long time to generate 7-3
Problems viewing reports 7-3
Old data appears in reports 7-3
Cannot drill down in reports 7-4
Error message appears when running reports 7-4
Reports are missing from reports lists 7-4

General Problems **7-4**
Web reporting session is timing out before or after session timeout value 7-4
Computer locks up or runs slowly 7-4

Contacting Technical Support **7-5**

A • Standard Reports

About CIMS Server Reports **A-4**
Location of CIMS Server Reports 1-4
Report Naming Conventions A-5

Conventions Used in This Appendix **A-5**

Reports by File Name **A-6**

Graphs **A-8**
Cost Trend—Accounts Graph A-8
Cost Trend—Rates Graph A-9
Resource Trend Graph A-10

Drill Down Reports **A-11**
Invoice Drill Down for Rate Group Report A-11
Invoice Drill Down for Rate Group by Date Report A-13
Invoice Drill Down for Units Report A-14
Invoice Drill Down for Units by Date Report A-16
Multilevel Drill Down for Units Report A-17

Reports **A-19**
Client Audit Report A-19
Rate Audit Report A-21
Transaction Audit Report A-23
Batch Report A-24
Account Budget for Period and YTD Report A-25
Line Item Budget for Period and YTD Report A-26
Configuration Report A-27
CICS Transaction Report A-28
Client Report A-29
Account Summary Daily Report A-30
Account Summary Daily 2 Report A-31
DB2 Summary Report A-32
Detail by Rate Group Report A-33
Detail by Rate Group/Identifier Report A-34
Detail Rate Codes by Identifiers A-35
Detail Rate Codes by Identifiers/Account A-36
MS Exchange 2000 Resource Report A-37
Invoice by Account Level V2 Report A-38

Alternate Invoice Report A-38
Account Total Invoice Report A-40
Invoice with Budget Report A-41
Invoice Report A-43
Invoice by Account Level Report (SQL Server Reporting Services) A-45
Invoice by Account Level Report (Crystal Reports) A-47
Invoice with Shifts Report A-49
Run Total Invoice Report A-51
Run Total Percent Report A-52
Run Total Rate Group Percent Report A-53
Run Total Invoice with Shifts A-54
Zero Cost Center Invoice Report A-55
Zero Cost Center Factor Report A-57
Job Cost Report A-58
MS SQL Server 2000 Resource Report A-60
Percentage Report A-61
Rate Report A-62
Top Cost Report A-63
Top 10 Bar Graph Report A-65
Top 10 Pie Chart Report A-67
Top Accounts for Rate Report A-69
Cost Trend Report A-70
Cost Trend by Rate Report A-71
Resource Usage Trend Report A-72
Transaction Report A-73
Cost Variance Report A-74
Cost Variance Drill Down Report A-75
Resource Variance Report A-76
Disk Directory Resource Report A-77
Account Summary by Week Report A-78
Account Summary by Week—Wide Report A-79
Account Summary YTD Report A-80
Account Summary YTD—Wide Report A-81

Spreadsheets A-82
Invoice Spreadsheet A-82
Run Total Invoice Spreadsheet A-83
Invoice by Rate Group Spreadsheet A-84
Invoice by Account Code Spreadsheet A-85
Proration by Total Amount Spreadsheet A-86
Proration by Rate Code Spreadsheet A-87
Proration by Rate Group Spreadsheet A-88

Top 10 Accounts for Rate Spreadsheet A-89
Account Summary Week Spreadsheet A-90
Account Summary YTD Spreadsheet A-91
Account Summary YTD by Rate Spreadsheet A-92
Account Summary YTD Cost by Rate Group Spreadsheet A-93

Crosstab Reports A-94
Daily Crosstab—Charges A-94
Daily Crosstab—Usage A-95
Detail by Identifier Crosstab A-96
Detail by Identifier by Date Crosstab A-97
Monthly Crosstab—Charges A-98
Monthly Crosstab—Usage A-99
Summary Crosstab—Charges A-100
Summary by Rate Group Crosstab—Charges A-101
Summary Crosstab—Usage A-102
Summary by Rate Group Crosstab—Usage A-103
Weekly Crosstab—Charges A-104
Weekly Crosstab—Usage A-105

Templates A-106
Report Both Template A-106
Report Cost Template A-108
Report Resource Template A-109
Spreadsheet Both Template A-109
Spreadsheets Cost Template A-111
Spreadsheets Resource Template A-112

Glossary

Index

Preface

CIMS Web Reporting is a key portion of the CIMS Server chargeback system. It offers a full range of IT resource reporting features that are accessible via your Web browser.

The technology behind CIMS Server and CIMS Server Web Reporting is based on CIMS Lab's many years of experience in the development and implementation of Resource Accounting, Capacity Planning and IT Chargeback products.

About CIMS Lab

Founded in 1974, CIMS Lab has focused on meeting the financial and resource reporting requirements of Information Services Departments. CIMS has evolved with corporate IT management requirements. Focused commitment to client service and support sets CIMS apart from competing products. Our goal is to provide the best chargeback and resource reporting software in the world at the lowest possible cost to our customers.

CIMS Lab strongly believes in and executes the concept of continuous product improvement. Customers have access to CIMS product development personnel to ensure that customer feedback and other critical issues are incorporated into the next release of the product.

Contacting CIMS Lab

To contact CIMS Lab with questions, comments, or problems, please use one of the following methods:

For product assistance or information:

USA & Canada, toll free - (800) 283-4267
International - (916) 783-8525
FAX - (916) 783-2090
World Wide Web - http://www.cimslab.com

Mailing Address:

CIMS Lab, Inc.
3013 Douglas Blvd., Suite 120
Roseville, CA 95661-3842

About This Guide

This guide explains how to use CIMS Server Web Reporting. Note that some features described in this guide might have been customized for your organization. In this case, consult your CIMS Server administrator for assistance.

CIMS Server Web Reporting is a component of CIMS Server. This guide assumes that you have the CIMS Server system installed and configured as described in the *CIMS Server Administrator's Guide*.

This guide contains the following chapters:.

Ch. No.	Chapter Name	Content Description
1	*Getting Started*	Introduces the CIMS Server Web Reporting interface and provides steps for logging in and out and other tasks.
2	*Running Reports*	Introduces the different report types and describes how to run these reports.
3	*Working With Reports*	Describes how navigate and use generated reports.
4	*Running and Working With CIMS Advanced Spreadsheets*	Describes how to use CIMS Advanced Spreadsheets.
5	*Administering CIMS Server Web Reporting*	Describes how to configure user-specific and system-wide administration settings for CIMS Server Web Reporting.

Ch. No.	Chapter Name	Content Description
6	*Using Transactions*	Describes how to use Miscellaneous, Recurring, and Credit transactions.
7	*Troubleshooting*	Describes problems you may encounter while using CIMS Server Web Reporting and how to solve them.
A	*Standard Reports*	Describes the standard graphs, reports, spreadsheets, and templates available with CIMS Server Web Reporting.

Terminology Used in This Guide: Reports, Graphs, and Spreadsheets

For simplicity, in this guide, the term "report" refers to reports, graphs, and spreadsheets unless noted otherwise.

Conventions

Some or all of the following conventions appear in this guide:

Symbol or Type Style	Represents	Example
Alternate color	hyperlinked cross-references to other sections in this guide; if you are viewing this guide online, you can click the cross-reference to jump directly to its location	.....see *Related Publications*.
Italic	words that are emphasized	...the entry *after* the current entry...
	a new term	...by *identifier* values.
	the titles of other manuals	*CIMS Server Administrator's Guide*
Bold	names of interface items such as tabs, boxes, buttons, lists, and check boxes.	The **Reports** menu Select the **Change Password** check box The Group Tree appears in the **Preview** tab
`Monospace`	directories, file names, command names, computer code, computer screen text, system responses, command line commands, what the user types	`Server` folder `ProcTransactions.wsf` script Type `iisreset /restart`

Symbol or Type Style	Represents	Example
< >	the name of a key on the keyboard	Press <Enter>
▸	navigating a menu or a folder	Reports ▸ View Published Reports

Related Publications

As you use this guide, you might find it helpful to have the *CIMS Server Administrator's Guide* available for reference.

1

Getting Started

This chapter describes how to get started using CIMS Server Web Reporting. CIMS Server Web Reporting is accessible via your Web browser (*Starting CIMS Server Web Reporting* on page 1-2).

About CIMS Server Web Reporting 1-2

Types of CIMS Server Web Reporting Users 1-2

Starting CIMS Server Web Reporting 1-2

Logging On To CIMS Server Web Reporting 1-3

Using the Menu Bar 1-5

Changing Your Password 1-5

Logging Off 1-6

Viewing Online Help 1-6

Timing Out 1-6

Assigning CIMS Server Folder Security Permissions 1-7

About CIMS Server Web Reporting

CIMS Server Web Reporting enables you to generate and view IT chargeback and resource accounting reports from a Web browser. These reports include invoice, budget, summary, trend, and variance reports in report, graph, and spreadsheet format.

You can save, copy text from, and print reports. In addition, many reports generated using CIMS Server Web Reporting include multi-level drill down capabilities that enable you to view detailed resource usage and cost information.

CIMS Server Web Reporting supports reports written in any of the following:

- Crystal Reports.
- SQL Server Reporting Services
- XML (this is the format used for CIMS Advanced Spreadsheets, see *Chapter 4, Running and Working With CIMS Advanced Spreadsheets*)

Note • Although CIMS Server Web Reporting is designed to use the preceding reporting tools, you might be able to use other reporting products. For more information, contact CIMS Lab (see *Contacting Technical Support* on page 7-5).

Types of CIMS Server Web Reporting Users

There are two types of CIMS Server Web Reporting **users:**

- **Administrators.** Administrators can perform administrative functions in CIMS Server Web Reporting such as changing the configuration options for the application (see *Configuring System-Wide Settings* on page 5-8). Administrative access is assigned by your CIMS Server administrator. For more information, refer to the *CIMS Server Administrator's Guide*.
- **End Users.** End users have no administrative privileges.

The terms CIMS Web administrator and CIMS Web end user are used in this guide to differentiate the two user types when needed.

Starting CIMS Server Web Reporting

To start CIMS Server Web Reporting, open your Web browser and enter the *URL* for CIMS Server Web Reporting in the **Address** bar. The specific URL depends on your organization—see your system administrator for the URL. The following is an example of a URL for CIMS Server Web Reporting:

`http://<intranet>/cims/`

If you are running the browser on the server that is running CIMS Server Web Reporting, enter the URL `http://localhost` or `http://`*`servername`*, where *servername* is the name of the local server.

Logging On To CIMS Server Web Reporting

There are two methods for logging on to CIMS Server Web Reporting:

- **Auto log on.** Auto log on enables you to use CIMS Server Web Reporting without first logging on to the application through the Login page. If your CIMS Server administrator has enabled auto log on for your user ID, you will see the following message on the home page when you start CIMS Server Web Reporting:

  `Welcome username, you are currently signed on as userid`

  If you are a CIMS Web administrator, you can click **Login** to open the Login page and log on as another user if needed (see the steps under the following bullet, **Manual log on**). If you are a CIMS Web end user, the Login page is inactive.

- **Manual log on**. If your CIMS Server administrator has not enabled auto log on for your user ID, you will see the following message on the home page when you start CIMS Server Web Reporting:

  `Not currently signed in, please click Login to begin`

  To log on, do the following:

  1. On the CIMS Server Web Reporting home page, click **Login** to open the Login page.
  2. Enter the following information, and then click **OK**:
     - Your user ID and password (required). If you do not know your user ID and password, contact your CIMS Server administrator.

       The password is case-sensitive. Type the password exactly as provided by your CIMS Server administrator.

     - Your company or organization name (if the **Your Company or Organization** box is present). Your CIMS Server administrator determines whether this box is present on the Login page. For more information, refer to the *CIMS Server Administrator's Guide*.

       Your company/organization name is saved in a *cookie* so that you do not have to re-enter it each time that you log on.

  The CIMS Server Web Reporting home page reappears as shown in example Figure 1-1 on page 1-4.

Figure 1-1 • CIMS Server Web Reporting Home Page

Using the Menu Bar

The menu bar enables you to easily navigate CIMS Server Web Reporting features. The use of the links and menus contained on the menu bar are discussed in the following chapters.

Figure 1-2 provides an overview of the functions of each of the links and menus on the menu bar.

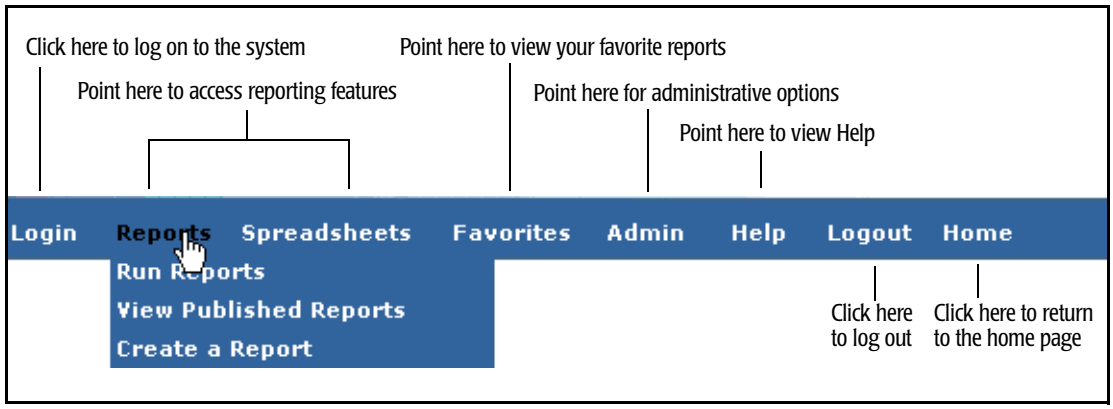


Figure 1-2 • CIMS Server Web Reporting Toolbar

Changing Your Password

Note • If you are a CIMS Web end user and are using auto logon, the information in this section is not applicable. However, if you are a CIMS Web administrator using auto logon, you can change the password of other users using the following steps.

Your CIMS Server administrator assigns user IDs and passwords using the CIMS Server Administrator program. If the **Change Password** check box is present on the Login page, you can change your password as follows:

1. Click **Login** to open the Login page.
2. Type your user ID, current password, and company or organization name (if required).
3. Select the **Change Password** check box and then click **OK**.
4. On the Change User Password Page, type your current password and the new password as directed. The password is alphanumeric and case-sensitive and can be a maximum of 16 characters.
5. Click **OK** to change the password and return to the home page.

Your CIMS Server administrator determines whether the **Change Password** check box is included on the Login page. For more information, refer to the *CIMS Server Administrator's Guide*.

Logging Off

Note • If you are a CIMS Web end user and are using auto logon, this section is not applicable.

If you are a CIMS Web administrator using auto logon, you can log on and off as other users during the same session by clicking Login and following the steps for a manual log on page 1-3.

If you are not using auto logon, click **Logout** to enable one user to log off and another to log on during the same session. The home page opens with the prompt:

`Not currently signed in, please click Login to begin.`

Viewing Online Help

To view online Help, click **Help**.

Timing Out

If you are inactive for a period longer then the amount of time specified on the Edit Configuration page (**Admin ▸ Configuration**), the CIMS Server Web Reporting session times out. If the session has timed out, one of the following occurs when you attempt to perform another task:

- If you are a CIMS Web end user and are using auto log on, you are automatically logged out and directed to `Please login`. Simply click **Login** to log on automatically.
- For all others, you are automatically logged out and are returned to the Login page to log on again.

Assigning CIMS Server Folder Security Permissions

Note • Your CIMS Server or Windows administrator should have already set the required folder security permissions described in this section. For more information, refer to the *CIMS Server Administrator's Guide*.

All CIMS Server Web Reporting users must have the following security permissions for the CIMS Server program folders shown. If CIMS Server is installed in the default location, the folders are in `C:\Program Files\CIMSLab`.

Folder	Required Permissions
`Server`	`Read & Execute`
`Server/Web/temp`	`Full Control`
`Server/Reports/Published`	`Read & Execute, Write`
`Admin`	`Read & Execute`

2

Running Reports

This chapter describes how to run reports in CIMS Server Web Reporting.

Note • For simplicity, the procedures in this section reflect commands in the Reports menu. However, these procedures are also applicable to spreadsheets. For example, if you are instructed to click Reports ▸ Run Reports, the corresponding sequence for spreadsheets is Spreadsheets ▸ Run Spreadsheets.

This chapter is not applicable to the CIMS Advanced Spreadsheets feature. This feature is discussed in *Chapter 4, Running and Working With CIMS Advanced Spreadsheets*.

Introduction to Report Types 2-2

Running Reports 2-3

Using Report Parameters 2-4

About Account Codes 2-7

Example: Running a Report 2-8

Creating and Running CIMS Web User Created Reports 2-9

Creating or Updating a CIMS Web User Created Report 2-9

Running a Web User Created Report 2-10

Deleting a Web User Created Report 2-10

Example: Creating and Running a Web User Created Report 2-11

Creating and Viewing Published Reports 2-12

Publishing Reports 2-12

Viewing Published Reports 2-14

Example: Creating and Viewing a Published Report 2-16

Introduction to Report Types

There are four types of reports that you can generate using CIMS Server Web Reporting:

- **Standard or Custom Reports.** CIMS Server includes a variety of standard Crystal and SQL Server Reporting Services reports. These standard reports include invoice, budget, summary, trend, and variance reports in report, graph, and spreadsheet format (see *Appendix A, Standard Reports*).

  The report descriptions and examples used in this guide reflect the standard CIMS reports. Typically, your report developer will customize the standard reports for your organization or will create new reports. Therefore, the parameters, look, and content of reports for your organization might differ.

  To run standard and/or custom reports, click **Reports ▸ Run Reports** and follow the steps in *Running Reports* on page 2-3

- **CIMS Web User Created Reports.** These reports are created using report templates that are supplied with CIMS Server Web Reporting (see *Templates* on page A-106) or developed by your report developer. Template reports differ from the standard or custom reports discussed previously in that CIMS Web users can create reports that contain the data and format that they want directly within the CIMS Server Web Reporting interface.

  To create a report, click **Reports ▸ Create a Report** and follow the steps in *Creating and Running CIMS Web User Created Reports* on page 2-9.

- **Published Reports.** These reports are created from generated reports. Publishing a report enables other CIMS Web users to view the report with the data as it appeared at the time the report was generated.

  To publish a report, follow the steps in *Creating and Viewing Published Reports* on page 2-12.

- **CIMS Advanced Spreadsheets.** CIMS Advanced Spreadsheets have more advanced features than Crystal Reports or SQL Server Reporting Services spreadsheets, including drill down and sorting capability. CIMS Advanced Spreadsheets are discussed in *Chapter 4, Running and Working With CIMS Advanced Spreadsheets*.

Running Reports

This section provides the steps for running a report from the CIMS Server Web Reporting application. You can also run and publish reports in batch mode as described in *Creating and Viewing Published Reports* on page 2-12.

To run a report:

1. Click **Reports** ▸ **Run Reports**. The report page opens displaying reports categorized by groups.
2. To expand the group, click + next to the report group that contains the report that you want to run.
3. Links to the available reports appear. Click the link for the report that you want to run as shown in example Figure 2-1.

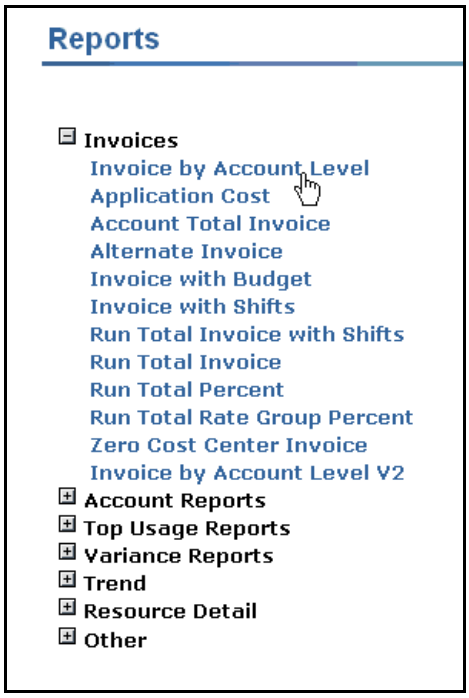


Figure 2-1 • Report Links

4. If the report requires parameters, enter the parameters on the parameters page and then click **OK** to generate the report. For a description of the standard parameters supplied by CIMS Lab, see *Using Report Parameters* on page 2-4.

You can do many things with the information in the generated report such as drill down on data and print and save the report. For more information, see *Chapter 3, Working With Reports*.

Note • Drill down is not available for graphs, spreadsheets other than advanced spreadsheets (see Chapter 4), or CIMS Web user created reports.

You can also publish the report so that others can view it in CIMS Server Web Reporting. Published reports are saved with the data that was generated at the time the reports were published. For more information, see *Publishing Reports* on page 2-12.

Using Report Parameters

Table 2-1 provides a description of the report parameters that are supplied by CIMS Lab.

Your reports might use other parameters that are custom for your site. For information about creating custom parameters, see *Creating Custom Report and Transaction Parameters* on page 5-11.

The parameter values that you enter are stored in a cookie so that you do not have to re-enter the values each time you run a report (unless you want to change the values).

Note • Parameters vary by report.

Parameter	Description
Account Code Level	The account code level that you want to view in the report. For example, the account code AABBBBCCC might contain three levels: the two-digit company code AA, the 6-digit division code AABBBB, and the 9-digit department code AABBBBCCC. The resource use and charge data will reflect the level that you select. For more information about account codes, see *About Account Codes* on page 2-7.
Audit Type	The type of changes that you want to view in CIMS Client, Rate, and Transaction table audit reports: all changes, additions, updates, or deletions.
Calendar Period	The calendar period for the data that you want to appear in the report.
Display Graph	If this parameter is **Y** (the default), a graph appears before the report. If this parameter is **N**, the graph does not appear.
From/To	The beginning and end dates for the data that you want to appear in the report.

Table 2-1 • Report Parameters

Parameter	Description
Identifier	This parameter provides data by the selected identifier. An *identifier* is a unique key that denotes the source of a resource that has been consumed (for example, a device name, server name, user ID, phone number).
Invoice Number	Some invoice reports contain separate invoices for the account codes selected. If this parameter is blank (the default), invoice numbering begins with 1. Use this parameter to begin invoice numbering from a another number (if needed). Your CIMS Server administrator determines whether this parameter appears for invoices. If this parameter is not available, the invoice number set in the CIMS Config Options table in the database is used and invoice numbers continue to increase sequentially each time you run an invoice. For example, if the last invoice in a report was 99, the next invoice that you run will begin with invoice number 100. For more information, refer to the *CIMS Server Administrator's Guide*.
Prorate	The amount that you want to prorate across accounts in proration reports.
Rate Code	This parameter provides data by the selected rate code. A *rate code* represents resource units consumed (for example, CPU time used, pages printed, e-mail message sent).
Rate Group	This parameter provides data for the selected rate group. A rate group contains rate codes.
Report Month	The month for the data that you want to appear in the report.
Report Year	The year for the data that you want to appear in the report.
Set the Date Range	The date range or the data that you want to appear in the report.
Start and End Value	The starting and ending identifier value.

Table 2-1 • Report Parameters (Continued)

Parameter	Description
Starting and Ending Account Code	This parameter works in conjunction with the Account Code Level parameter and specifies the account codes for that level that appear in the report. If you want all account codes for that level to appear in the report, click **Lowest Possible Account** for the starting account code and **Highest Possible Account** for the ending account code. If you want specific account codes, click the appropriate start and end codes or click **Custom** and type the start and end codes.
Transaction ID Start and End	This parameter provides data by the selected CICS transaction ID range. For example, if you want data for the following three transaction IDs: CESF, DEGV, and TINQ, type CESF as the start and TINQ as the end.
TopN	This parameter specifies the number of account codes that appear in a report or the drill down for a report. For example, if you type 1, only the account code that used the most resources or incurred the most charges appears. If you type 2, the highest and second highest account codes appear.
Transaction Type	This parameter provides data for the selected transaction type. For more information about transactions, see *Chapter 6, Using Transactions*.
Zero Cost Processing Option	The Zero Cost Invoice report may be processed in two ways: ■ **A-Factor Total.** This factors the invoice total by the zero cost amount. ■ **B-Factor Rates.** This factors each resource rate by the zero cost amount.
Zero Cost Amount	The zero cost amount. You can type this amount with or without the decimal point. For example, 100000 or 100000.00. For more information about zero cost, refer to the *CIMS Server Administrator's Guide*.

Table 2-1 • Report Parameters (Continued)

About Account Codes

An account code is an alphanumeric string that identifies the hierarchy of a resource record. Account codes contain sufficient information to describe what resource was used by what entity. These codes may contain levels such as Company, Division, Cost Center, etc.

For example, if your organization cost center structure is:

Level 1	Company
Level 2	Division
Level 3	Department within division
Level 4	Cost Center within department
Level 5	Application within cost center

Your account code structure might be designed as shown in Table 2-2.

DESCRIPTION (LEVEL)	EXAMPLE
Full Account Code	AABBBBCCCDDDAPP1
Company Code	AA
Division Code	BBBB
Department Code	CCC
Cost Center Code	DDD
Application Code	APP1

Table 2-2 • Example Account Code Structure

The account codes and account code levels that appear on the parameters page are set by your CIMS Server administrator. For more information, refer to the *CIMS Server Administrator's Guide*.

Example: Running a Report

Figure 2-2 provides an example of the parameters used to create an Invoice by Account Level report for the month of June. In this example, Division is the first level of the account code. Figure 2-3 shows the resulting report.

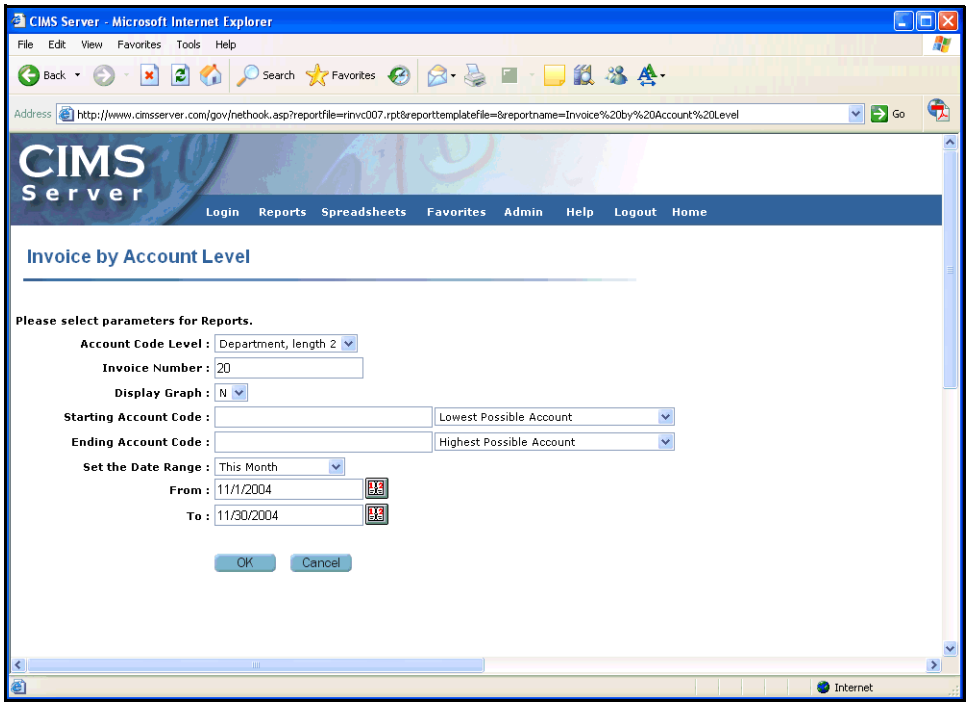


Figure 2-2 • Example Parameters for the Invoice by Account Level Report

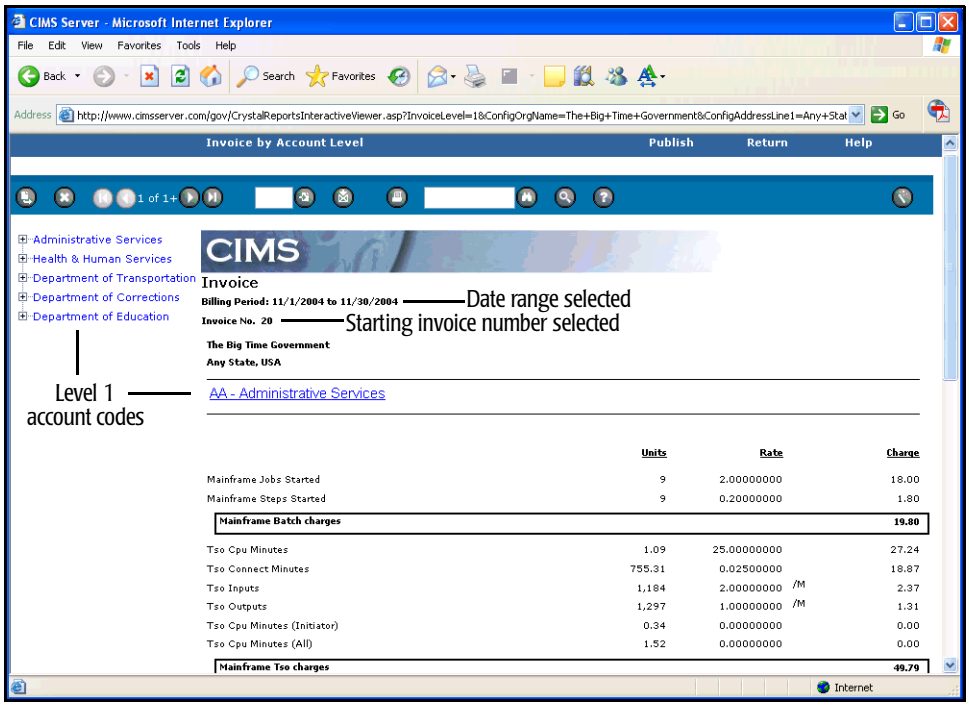


Figure 2-3 • Example Invoice by Account Level Report

Creating and Running CIMS Web User Created Reports

This section describes how to create and run reports using the report templates provided by CIMS Lab. Note that templates created by your report developer may differ.

Creating or Updating a CIMS Web User Created Report

The report templates provided by CIMS Lab enable you to choose the rate codes that you want to appear in the report. You can specify that the report display the resource *usage* per rate code, the resource *cost* per rate code, or both usage and cost. All cost and usage is displayed by account code and rate code. Once you have created a report, you can update the report (for example, select different rate codes) at any time.

To create or update a report:

1 Click **Reports ▸ Create a Report**. The Build a Report page opens.

2 Enter or update the following parameters for the report:

- **Go to Report**. Click **New Report** to create a new report or click an existing report to update the report.
- **Report Type**. Click the report type that you want to create:
  - **Resource** (resource usage by account and rate code description)
  - **Cost** (charges by account and rate code description)
  - **Both** (resource and cost information)
- **Report Name (required)**. The name that you want to assign to the report.
- **Report Description**. A brief description of the report.
- **Make visible to all users**. If this check box *is not* selected (the default), the report is available only to those in your user group. If this check box is selected, the report is available to all CIMS Web users.
- **Resource**. In the column select boxes, choose the rate code that you want to appear in that column. You can choose up to four columns/rate codes for Both reports and eight columns/rate codes for Cost or Resource reports.
- **Decimal Places**. Type the number of decimal digits that you want to appear in the resource usage amount.

3 If you are creating a new report, click **Add**. If you are updating a report, click **Update**.

Once created, reports appear on the Reports page (**Reports ▸ Run Reports**) under a report group determined by your CIMS Server administrator (see Figure 2-4 for an example). For more information about setting the report group for these reports, refer to the *CIMS Server Administrator's Guide*.

Running a Web User Created Report

To run a report:

1 Click **Reports** ▸ **Run Reports**. The Reports page opens displaying reports categorized by groups.

2 Expand the report group that contains the created reports, and then click the report that you want to run as shown in example Figure 2-4.

Figure 2-4 • Example Links for Web User Created Reports

3 Enter the parameters for the report on the parameters page and then click **OK** to generate the report. For a description of the parameters, see *Using Report Parameters* on page 2-4.

You can do many things with the information in the generated report such print and save the report. For more information, see *Chapter 3, Working With Reports*.

You can also publish the report so that others can view it in CIMS Server Web Reporting. Published reports are saved with the data that was generated at the time the reports were published. For more information, see *Publishing Reports* on page 2-12.

Deleting a Web User Created Report

To delete a report:

1 Click **Reports** ▸ **Create a Report**.

2 On the Build a Report page, click the report in the **Go to Report** select box.

3 Click **Delete** and then click **OK** in the confirmation dialog box to delete the report.

Example: Creating and Running a Web User Created Report

Figure 2-5 shows the creation of a Both report called Job Report. Figure 2-6 shows the resulting report that has been run from the **Reports** menu.

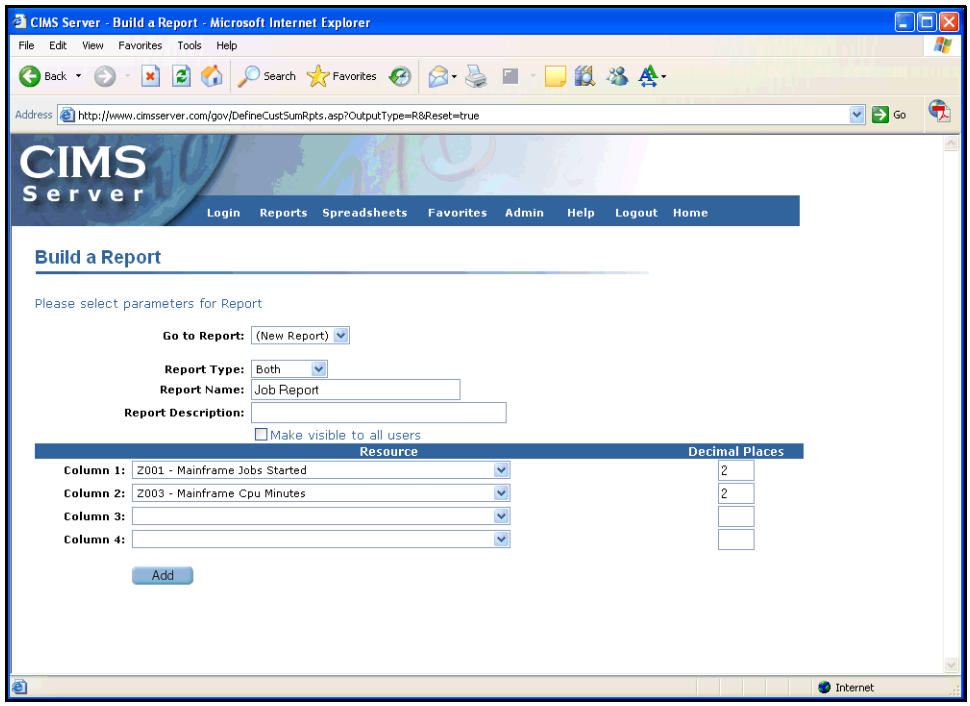


Figure 2-5 • Example of Creating a Report

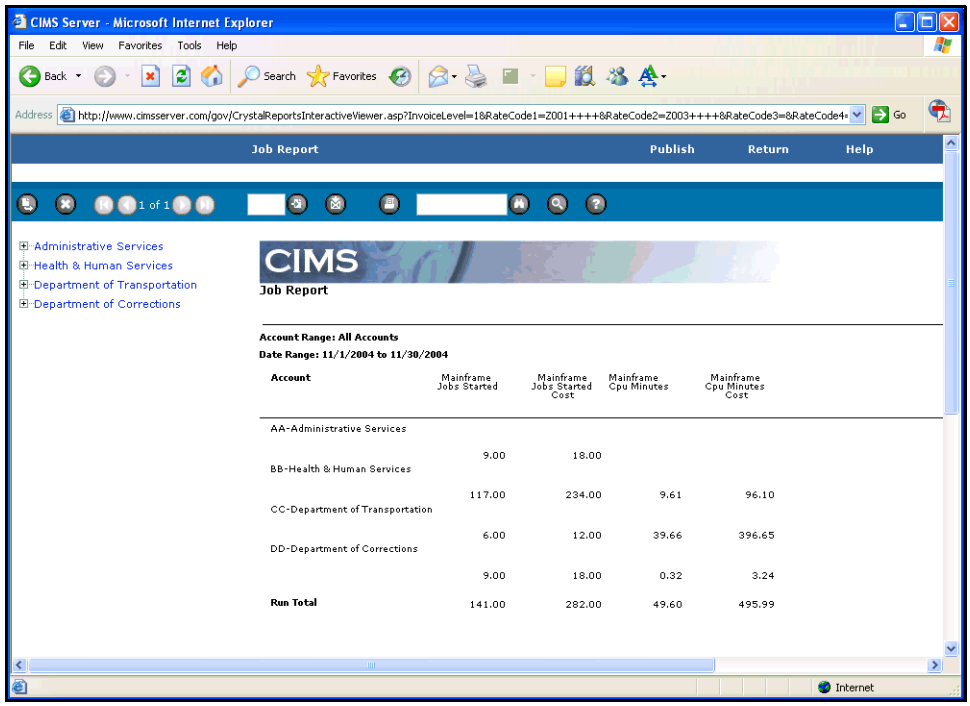


Figure 2-6 • Example Web User Created Report

Creating and Viewing Published Reports

Once you have generated a report, you can publish the report. Publishing a report enables other CIMS Web users to view the report without having to regenerate it.

Note • Reports that involve a wide range of dates or account codes can require excessive system time and resources to generate. Consider publishing or saving these reports for quicker access (see *Publishing Reports vs. Saving Reports*).

Published reports can be created directly within CIMS Server Web Reporting as described in this section or in batch. CIMS Server includes a powerful feature that enables you to generate published reports in batch and then distribute the reports to recipients via e-mail. For more information about generating and distributing reports in batch, refer to the *CIMS Server Administrator's Guide*.

Publishing Reports vs. Saving Reports

Both publishing and saving a report saves a report that you have generated. However, publishing a report saves the report on the Web server so that you and others can view it from within CIMS Server Web Reporting. (Your CIMS Server administrator determines where the published reports are stored on the server. For more information, refer to the *CIMS Server Administrator's Guide*.)

Saving a report saves the report to the local or network drive that you choose. In this case, the report is not accessible via the CIMS Server Web Reporting interface. For more information about saving reports, see *Saving Reports* on page 3-8.

Publishing Reports

To publish a report:

1. Run a report.
2. On the report page, click **Publish**. The Save Report window appears. Enter the following:
   - **Report File**. The file name of the published report. You can use the default file name or type another name. If you want to include the report in your favorites list, you need to use the default file name (see *Working With Favorite Reports* on page 5-2).
   - **Location**. Location specifies the subfolder name for the published reports within the overall published reports folder. For example, if you click **User**, the published reports are stored in the `user` subfolder within the published reports folder.

Location also determines the accessibility of the report as follows:

- **User**. The report is available to the specified user only. If you are a CIMS Web administrator, you can choose any user ID within your user group. If you are not an administrator, the user defaults to your user ID.
- **Group**. The report is available to those in your current user group.
- **Account**. The report is available to CIMS users in a group that is allowed to view the selected client account code. (To enable client account code access to a group, refer to the *CIMS Server Administrator's Guide*). The report is stored in a subfolder with the same name as the account code that you click in the account list. The **Account** option appears only if you are a CIMS Web administrator.
- **Global**. The report is available to anyone using CIMS Server Web Reporting. The **Global** option appears only if you are a CIMS Web administrator.

Note • The preceding access permissions are applicable only within CIMS Server Web Reporting—it does not affect the ability of Windows users to access reports from the hard drive. If you want to control access to reports via Windows, you need to set Windows security for the folders that contain the published reports. CIMS Web users, however, must have the permissions shown in *Assigning CIMS Server Folder Security Permissions* **on page 1-7.**

- **Reporting Period**. The date period assigned to the report for storage and retrieval purposes. This date period does not affect the date of the data in the report.
- **Replace Existing Report**. Select this check box to replace any existing published report with the same file name with this report.

3 Click **OK** to publish the new report to the location that you specified.

Viewing Published Reports

Note • Links to published reports that are designated as favorite reports appear in the left side of the home page. Click these links to quickly access these reports. For more information about favorite reports, see *Working With Favorite Reports* on page 5-2.

To view a published report:

1 Click **Reports ▸ View Published Reports**.

2 The **Published Reports** page opens. The reports that appear on this page are determined by the location that was set when the report was published (see *Publishing Reports* on page 2-12) and the **Date Range** and **Location** parameters on the page (see *Filtering the List of Published Reports* on page 2-15).

3 Click the report date, name, or location (if present, see the following note) to open the report.

Note • By default, published reports include the full path to the folder that contains the report. You can choose to show or hide the path (see page 5-5).

Drill down capability in published reports varies by report.

Filtering the List of Published Reports

You can filter the list of published reports using the **Date Range** and **Location** parameters as follows.

Date Range This parameter lists reports by the reporting period that was assigned when the published report was created (see *Publishing Reports* on page 2-12). This may or may not be the date of the data in the report.

From and To Enter the beginning and end date of listed reports if you cannot select the date that you want from **Date Range**.

Click the Calendar button to choose a beginning or end date for listed reports.

Location Click one of the following:

- **All**. All published reports that you can view appear.
- **Global**. All published reports that were assigned to a Global location appear.
- **User**. All published reports that were assigned to a User location that you can view appear.
- **Group**. All published reports that were assigned to a Group location that you can view appear.
- **Account.** All published reports that were assigned to an Account location that you can view appear. If you click a specific account code, published reports for only that account code appear.

Sorting the List of Published Reports

To sort the list of published reports by date or report, click **Date** or **Reports**, respectively.

Example: Creating and Viewing a Published Report

Figure 2-7 shows the creation of a published Invoice by Account Level report.

Figure 2-8 shows the link for the resulting report on the Published Reports page (**Reports ▸ View Published Reports**).

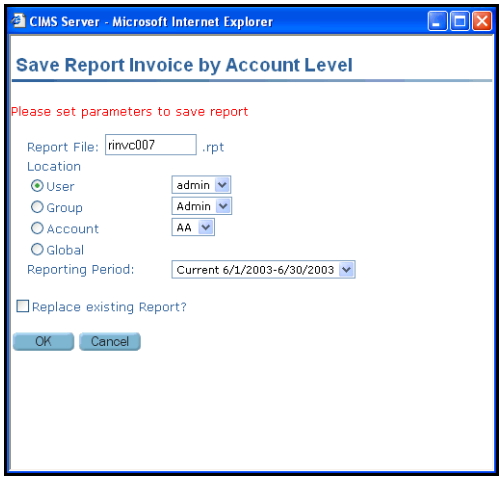


Figure 2-7 • Example of Creating a Published Report

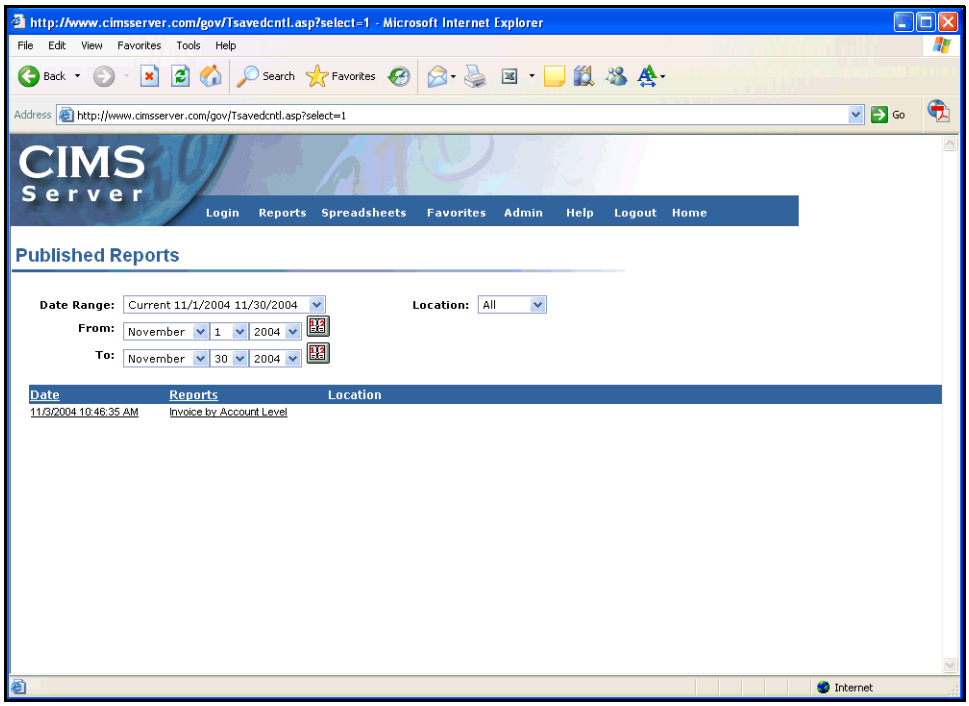


Figure 2-8 • Example Published Report Link

3

Working With Reports

This chapter describes how to navigate and use generated reports.

Working With Reports **3-2**
About the Report Interface 3-2
Using the Reporting Toolbar 3-3
Navigating Using the Group Tree 3-4
Drilling Down in Reports 3-4
Publishing Reports 3-8
Saving Reports 3-8
Copying Text From a Report 3-8

Working With Spreadsheets **3-9**
About the Spreadsheet Interface 3-9
Publishing Spreadsheets 3-9
Opening a Spreadsheet in Excel 3-10
Working With Spreadsheets in Excel 3-10

Working With Reports

This section describes how to navigate and use reports. Except where noted, the information in this section is applicable to all report types.

The figures in this section reflect Crystal Reports 9 using the default HTML viewer. If you are not using this setup, the interface will appear similar.

About the Report Interface

Figure 3-1 provides an introduction to the report interface. The use of the interface, including how to use the toolbar, is discussed in the following sections.

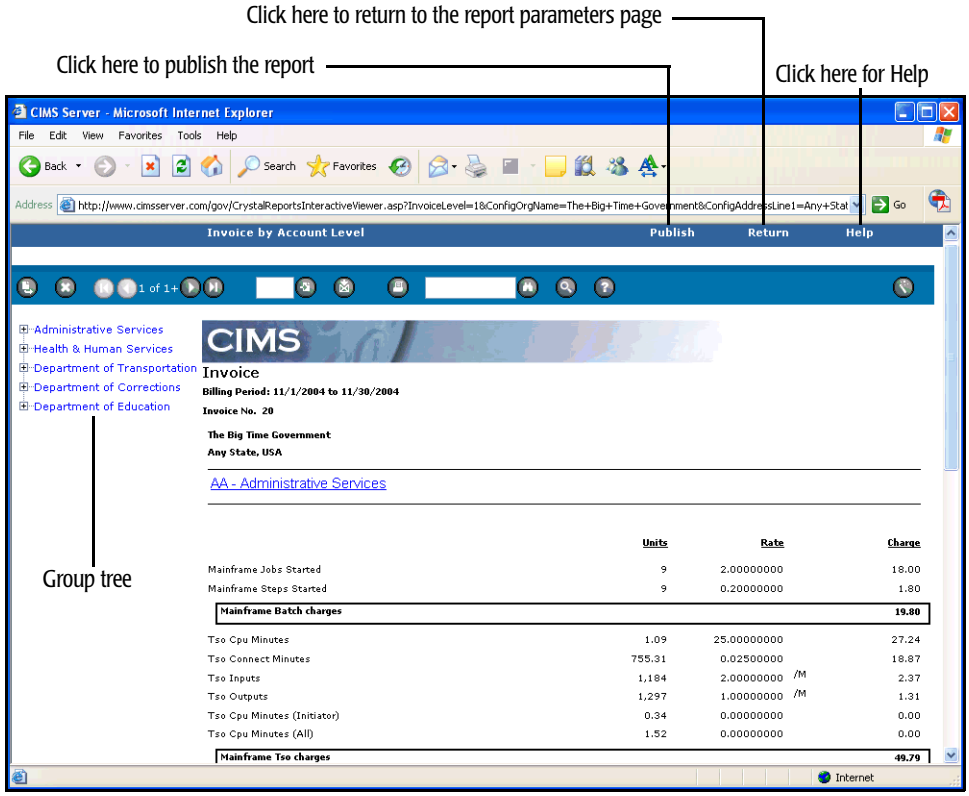


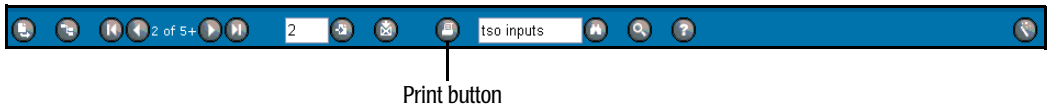
Figure 3-1 • Report Interface

Using the Reporting Toolbar

This section provides an overview of the report toolbar options.

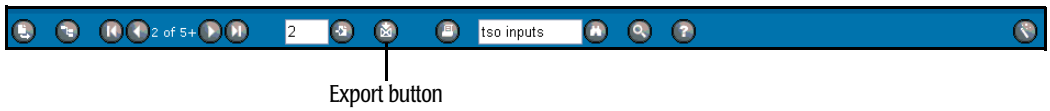
Printing a Report

To print a Crystal report, click the Print button. The Print button does not appear in the toolbar for Reporting Services reports. To print these reports, you must export the report to a PDF file from the toolbar.



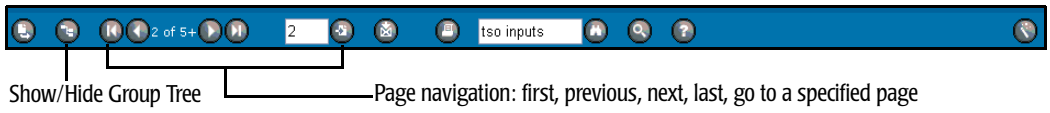
Saving a Report

To save a report, click the Export button. For more information about saving reports, see page 3-8.



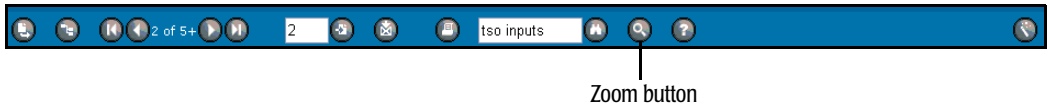
Navigating a Report

To navigate through the pages of a report, click the page arrows or type a page number. To open and close the Group Tree that appears to the left of the report, click the Show/Hide Group Tree button. For more information about the Group Tree, see page 3-4.



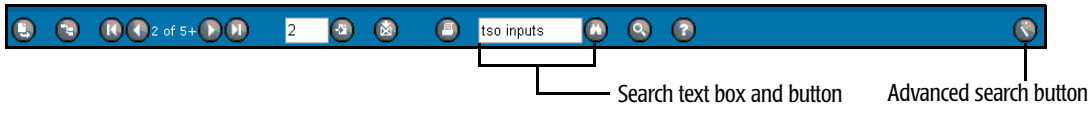
Zooming In or Out

To enlarge or shrink the size of information displayed in a report, click the Zoom button.



Searching Text in a Report

To search for text in the report, type the text that you want to search for and then click the Search button.



Stopping a Report from Loading (ActiveX Viewer Only)

If you are using the ActiveX viewer, you can click the Stop Loading button to stop a report from loading. This button is available only when the report is loading.

Navigating Using the Group Tree

The Group Tree appears to the left of the report (see Figure 3-1 on page 3-2). This tree view enables you to navigate down to data.

Note • If the Group Tree does not appear, click the toggle button.

Similar to the manner in which Windows Explorer displays folders and files, items in the report are listed in the **Preview** tab as an expandable hierarchy.

To view the item in the report, click the item. To expand or collapse an item, click the + or - beside the item.

Drilling Down in Reports

For certain items in a report, you can drill down to view information specific to that item or you can drill down to generate a separate report for the item. For example, in invoices, you can drill down on resource units to open a report that breaks out the units by identifier (see *Report Drill Down Example* on page 3-6).

If you are using the ActiveX viewer, the cursor becomes a magnifying glass when you point to an item that enables you to drill down to more detailed information within the report.

The icon becomes a hand when you point to an item that enables you to drill down to another report.

If you are using the HTML viewer, the hand cursor appears for both types of drill down.

To drill down in a report:

1. Place the cursor on the appropriate item in the report. For example, a rate or charge.
2. Double-click the item. Detailed information about the item appears.
3. You can continue to drill down where allowed to view additional detailed information.

To drill down to another report:

1 Place the cursor on the appropriate item in the report. For example, an account code or resource units.

2 Click the item. Depending upon item that you click, the report either appears in the same browser window or in a separate window. If the report opens in a separate window, the parameters page for the report appears first.

Note • Drill down to another report is available only in invoice reports.

Closing the Drill Down View

To close the drill down view in a report:

If you are using the HTML viewer, click the **Back** button in the browser toolbar or Main Report button on the report toolbar (Crystal 9 only).

If you are using the ActiveX viewer, click the close button on the report toolbar or right-click the drill down view tab and then click **Close Current Drill Down View**.

To close a drill down report:

Click the close button in the browser window .

Report Drill Down Example

The drill down example shown in example Figure 3-2 shows a drill down on resource units.

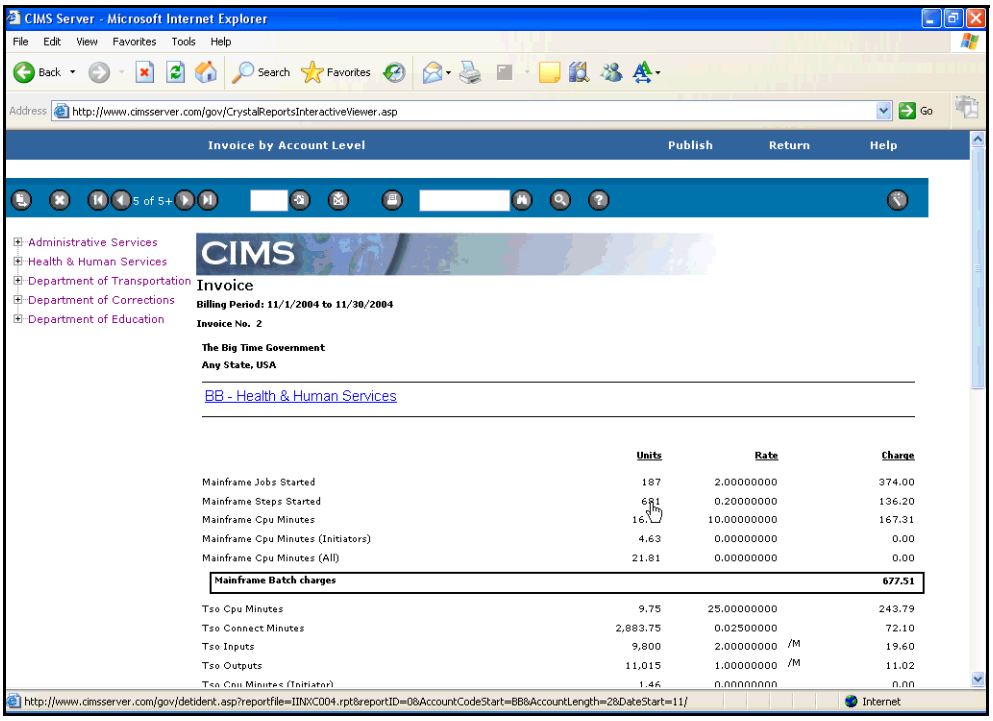


Figure 3-2 • Drill Down on Units

The parameters page for the drill down report opens as shown in example Figure 3-3 on page 3-7. This page enables you to break down and view the resource units by identifier or identifiers.

Note that the possible identifiers that you can select include **Usage Dates** and **Accounting Dates**. Usage dates are the actual start and end dates in the CIMS Server Resource Records. Accounting dates are derived from the usage end date as described in the *CIMS Server Administrator's Guide*.

In Figure 3-3 on page 3-7, the identifiers **Usage Dates** and **Jobname** are selected.

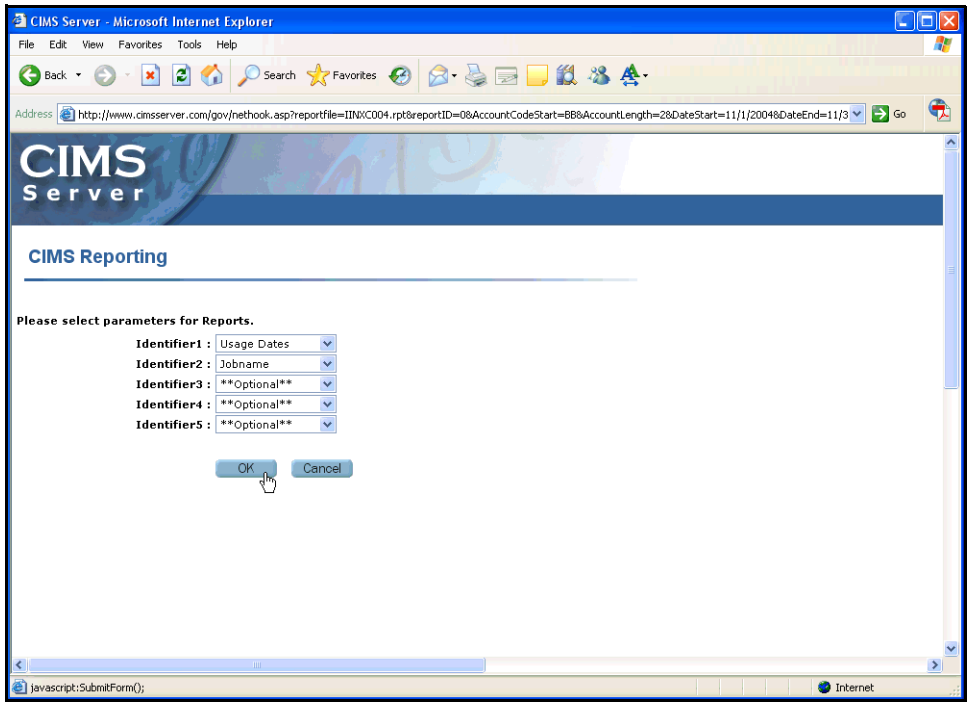


Figure 3-3 • Select Report Parameters

Figure 3-4 shows the resulting report. The units are broken down by usage dates and job names.

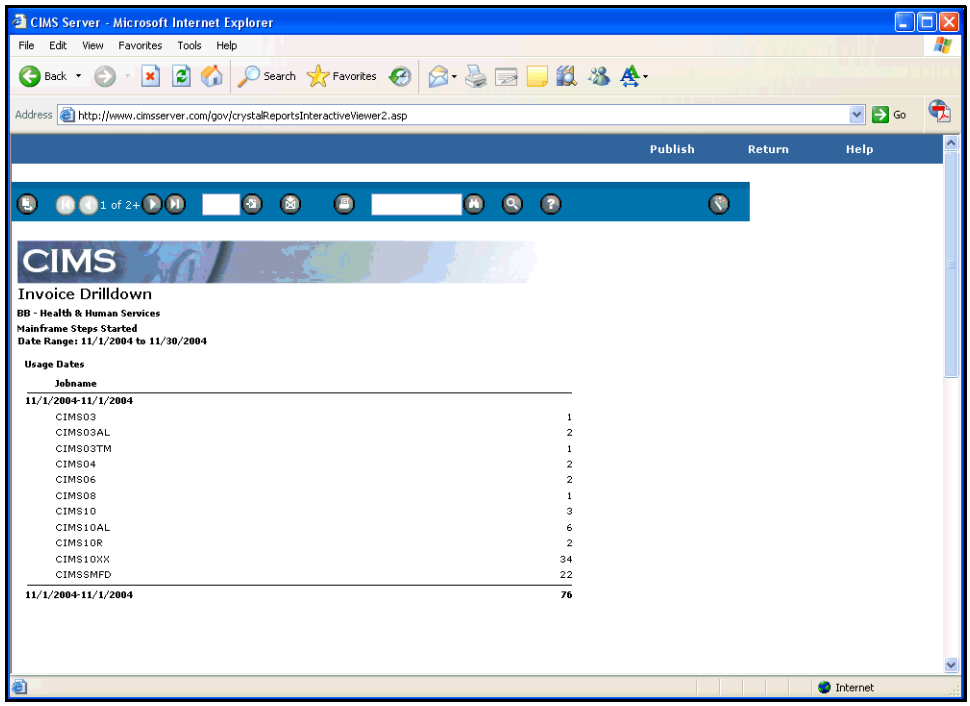


Figure 3-4 • Drill down by Identifier Report

Publishing Reports

See *Publishing Reports* on page 2-12.

Saving Reports

Note • Saving a report is distinct from the process of publishing a report. Saving a report saves the report to a local or network drive. When you save a report, users can access the report from this location. When you publish a report, users can access the report directly from the CIMS Server Web Reporting application. For more information about published reports, see *Creating and Viewing Published Reports* on page 2-12.

CIMS Server Web Reporting enables you to save reports that you generate so that you or other users can access the report again without regenerating the report. For example, if you run a daily report that others need to view, you can generate the report each day and save it in an accessible drive or folder.

Note • Reports that involve a wide range of dates or account codes can require excessive system time and resources to generate. Consider publishing or saving these reports for quicker access.

To save a report:

1 On the report page, click the Export button on the report toolbar .

2 Follow the instructions in the dialog boxes that are presented.

If you want to share the saved report with others, choose a network drive when you save the report.

Copying Text From a Report

To copy an item in a report, right-click the item, and then click **Copy**. The system places the text in the Windows clipboard, enabling you to paste the text into other applications.

Working With Spreadsheets

This section describes how to use CIMS Server spreadsheets. When you run a spreadsheet, CIMS Server Web Reporting presents the report data in Microsoft Excel. You must have Excel installed on the client running the spreadsheet.

About the Spreadsheet Interface

Figure 3-5 provides an introduction to the spreadsheet interface. You can view and/or publish the spreadsheet from this interface or you can open the spreadsheet in Microsoft Excel and save, print, and/or edit the spreadsheet.

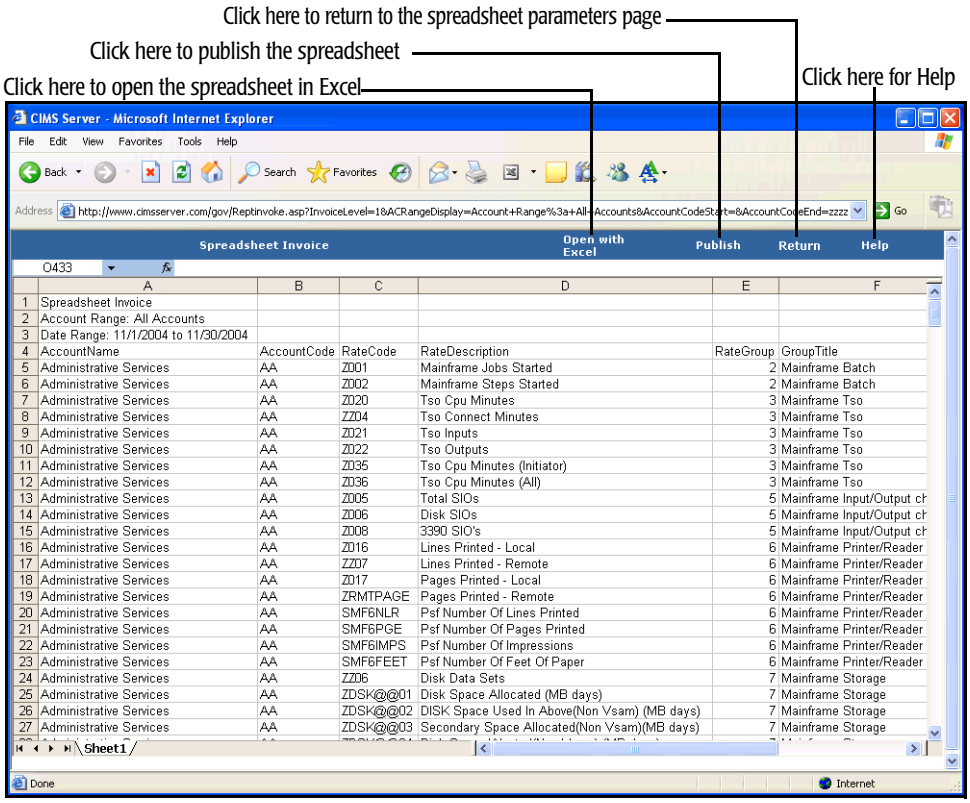


Figure 3-5 • Spreadsheet Interface

Publishing Spreadsheets

See *Publishing Reports* on page 2-12.

Opening a Spreadsheet in Excel

To open a spreadsheet in Excel:

Click **Open with Excel**.

The spreadsheet opens in Excel within the Web browser. You can then save, print, and/or edit the spreadsheet using the Excel commands and toolbar.

If the Excel toolbar does not appear, click the Tools button on the browser toolbar.

Working With Spreadsheets in Excel

To save a spreadsheet:

1. Click **File** ▸ **Save As** on the browser menu bar.
2. Navigate to the folder that you want to save the file in, and then enter the file name and file type in the **File name** and **Save as type** select boxes.
3. Click **Save** to save the file to the location you selected.

Note • **You need to click Save As each time you want to save the spreadsheet. Clicking the Save button on the Excel toolbar will not save the spreadsheet.**

For more information about the benefits of saving spreadsheets rather than regenerating them, see *Saving Reports* on page 3-8.

To print a spreadsheet:

1. Click **File** ▸ **Print** on the browser menu bar or the print button on the Excel toolbar.

To edit a spreadsheet:

Edit the spreadsheet as required and then follow the steps in *To save a spreadsheet:*.

To close a spreadsheet in Excel:

Click **Back** to return to the CIMS Server Web Reporting spreadsheet interface.

Note • **Any changes you made to the spreadsheet while the report was open in Excel are not saved in CIMS Server Web Reporting**.

4

Running and Working With CIMS Advanced Spreadsheets

This chapter describes how to run and use CIMS Advanced Spreadsheets. Your CIMS Server administrator determines whether CIMS Advanced Spreadsheets are available in CIMS Server Web Reporting. For more information, refer to the *CIMS Server Administrator's Guide*.

About CIMS Advanced Spreadsheets 4-2

Running CIMS Advanced Spreadsheets 4-3

Running a Drill Down or Static Advanced Spreadsheet 4-3

Running a Crosstab Advanced Spreadsheet 4-6

Working With CIMS Advanced Spreadsheets 4-8

About the CIMS Advanced Spreadsheet Interface 4-8

Advanced Spreadsheet Column Description 4-9

Drilling Down in a Spreadsheet 4-10

Working With CIMS Advances Spreadsheets in Excel 4-12

Standard Advanced Spreadsheet Descriptions 4-14

Complete Summary View 4-15

Summary By Account Code 4-18

Summary By Rate Code 4-21

Summary By Rate Group 4-24

Crosstab Spreadsheet 4-27

About CIMS Advanced Spreadsheets

The CIMS Advanced Spreadsheets feature enables you to build spreadsheets that provide more features than the standard spreadsheets described *Appendix A, Standard Reports*, including drill down and sorting capability.

The descriptions and examples used in this chapter reflect the advanced spreadsheets provided with CIMS Server. The spreadsheets used by your organization, including the names, parameters, look, and content of the spreadsheets, might differ for your organization.

There are three types of standard advanced spreadsheets. The data that appears in the spreadsheets is based on the parameters and columns that you select for the spreadsheet.

- **Static.** Provides a static view of data.
- **Drill down.** Provides the ability to drill down on data in a spreadsheet to view detailed data.
- **Crosstab.** Crosstab spreadsheets are synonymous with PivotTable reports in Excel. These spreadsheets provide the ability to change rows and columns to see different summaries of data.

  Crosstab spreadsheets can also provide drill down capability depending on the fields that you select (see *Running a Crosstab Advanced Spreadsheet* on page 4-6).

For a description of each of the standard advanced spreadsheets provided with CIMS Server, see *Standard Advanced Spreadsheet Descriptions* on page 4-14.

Running CIMS Advanced Spreadsheets

This section provides the steps for running CIMS Advanced Spreadsheets. The steps differ if you are running a drill down or static spreadsheet or a crosstab spreadsheet.

Running a Drill Down or Static Advanced Spreadsheet

To run a drill down or static advanced spreadsheet:

1 Click the link for the spreadsheet that you want to run as shown in example Figure 4-1.

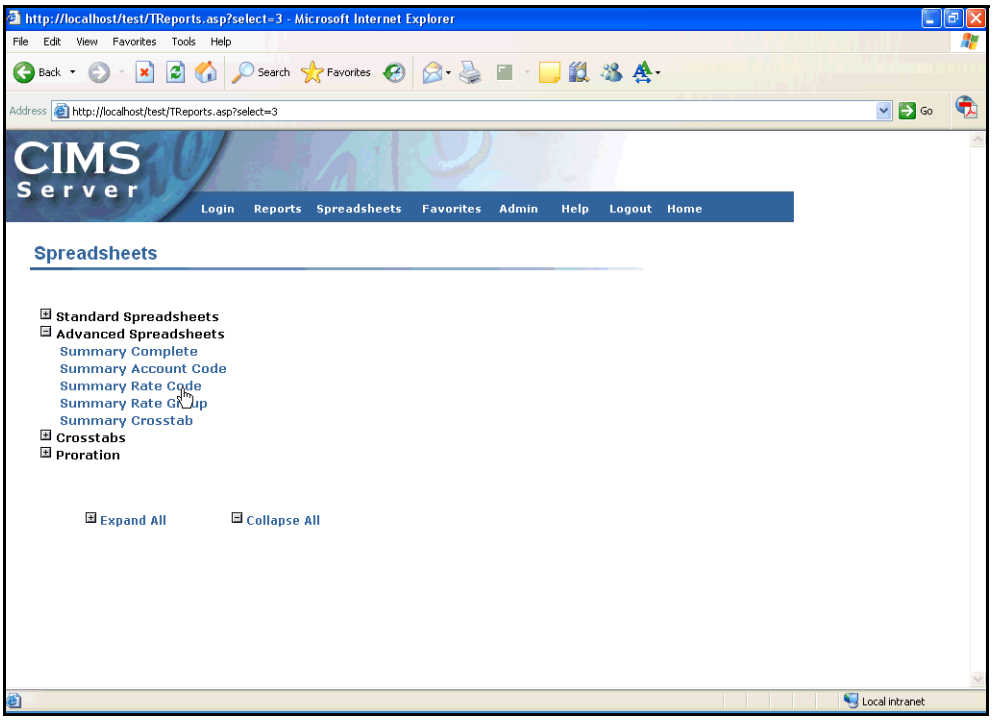


Figure 4-1 • Selecting a CIMS Advanced Spreadsheet

The parameters page for the selected spreadsheet opens.

2 In the **Please select parameters for Spreadsheets** area, enter the parameters for the data that you want to appear in the spreadsheet. The following are descriptions of the parameters for the standard advanced spreadsheets provided with CIMS Server. Your spreadsheets might use other parameters that are custom for your site.

The parameter values that you enter are stored in a cookie so that you do not have to re-enter the values each time you run a spreadsheet (unless you want to change the values).

Account Code Level

The account code level that you want to view in the spreadsheet. For example, the account code AABBBBCCC might contain three levels: the two-digit company code AA, the 6-digit division code AABBBB, and the 9-digit department code AABBBBCCC. The resource use and charge data will reflect the level that you select.

For more information about account codes, see *About Account Codes* on page 2-7.

Starting and Ending Account Code

This parameter works in conjunction with the Account Code Level parameter and specifies the account codes for that level that appear in the report.

If you want all account codes for that level to appear in the report, click **Lowest Possible Account** for the starting account code and **Highest Possible Account** for the ending account code.

If you want specific account codes, click the appropriate start and end codes or click **Custom** and type the start and end codes.

Set the Date Range

The date range for the data that you want to appear in the spreadsheet.

From/To

The beginning and end dates for the data that you want to appear in the spreadsheet if you cannot select the date that you want from **Set the Date Range**.

You can click the Calendar button to choose the from and to date.

3 Each spreadsheet includes default columns for the data. However, you can select additional columns to include in the spreadsheet and specify the sort order and conditions for the data in these columns (if applicable).

In the **Please select spreadsheet column and sorting options** area, select the optional columns that you want to include in the spreadsheet. To select a column, click **Select**, **Sort Ascending**, **Sort Descending**, or **Condition** (see the following descriptions). Note that available options depend on the column.

If you do not want a column to appear in the spreadsheet, click **Hide**.

Fields that are designated as * ***Drilldown Only*** appear only in the spreadsheet that is opened when you drill down on data (see *Drilling Down in a Spreadsheet* on page 4-10).

Select	The column appears in the spreadsheet.
Hide	The field column does not appear in the spreadsheet.
Sort Ascending	The column appears in the spreadsheet and the column values are displayed in ascending order. Note that if preceding columns are set to ascending or descending, the sort option for the preceding columns takes precedence beginning from left to right.
Sort Descending	The column appears in the spreadsheet and the field values are displayed in descending order. Note that if preceding columns are set to ascending or descending, the sort option for the preceding columns takes precedence beginning from left to right.
Condition	The column appears in the spreadsheet and the field values must be greater than (>), less than (<), or equal (=) to the value that you specify. For example, if you want costs greater than $100 to appear in a spreadsheet, click the greater than symbol (>) and type 100. Use a decimal as needed, e.g., type $225.75 as 225.75.

For a description of the columns for the standard advanced spreadsheets provided with CIMS Server, see *Advanced Spreadsheet Column Description* on page 4-9.

4 Click **Submit** to generate the spreadsheet.

You can do many things with the information in the generated spreadsheet such as drill down on data (if you run a drill down spreadsheet), open the spreadsheet in Excel, and print and save the report. For more information, see *Working With CIMS Advanced Spreadsheets* on page 4-8.

Running a Crosstab Advanced Spreadsheet

The crosstab spreadsheets are synonymous with PivotTable reports in Excel. The parameters page for a crosstab spreadsheet includes a wizard that enables you to choose the fields that you want to appear in the spreadsheet.

To run a crosstab advanced spreadsheet, follow Step 1 through Step 2 in *Running a Drill Down or Static Advanced Spreadsheet* and then use the crosstab wizard as follows:

1 Click **CLICK HERE TO SHOW THE WIZARD**.

The CIMS Crosstab Wizard opens. The wizard presents the spreadsheet divided into three areas. On the right are the fields that you can place in each of these areas (one field per area).

2 Drag the field that you want into one of the three areas of the spreadsheet as shown in Figure 4-2. In this example, the resulting spreadsheet will show charges by rate code for each account code as shown in *Crosstab Spreadsheet Example* on page 4-28.

The following fields provide drill down capability when they are placed in the main content area: Money Value, Rate Index, Rate Group, Resource Units.

This is the column head area. In this example, rate codes will appear in the column heads.

This is the first column area. In this example, account codes will appear in this column.

This is the main content area. Numeric value fields such as Money Value and Resource Units are usually placed in this field. In this example, the Money Value field is placed in this area. Costs by rate code and account code will appear as column values. For an example of the resulting spreadsheet, see Figure 4-19 on page 4-28.

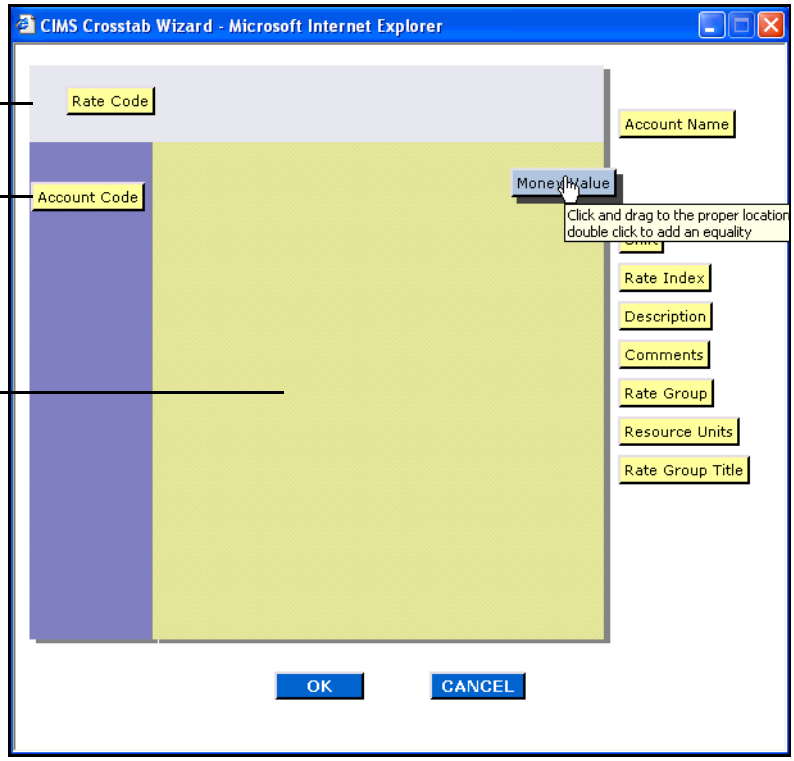


Figure 4-2 • CIMS Crosstab Wizard

3 Apply optional settings to the fields as follows:

a You can apply =, >, or < conditions to any of the fields. For example, if you want to view data for rate code Z001 only, double-click the Rate Code field and set the condition in the Condition Wizard to Rate Code = Z001 as shown in Figure 4-3.

b Numeric value fields such as Money Value are usually placed in the main content field. Values in the main content field are aggregated by sum. To change the aggregation type, double-click anywhere in the field to open the Function Wizard as shown in Figure 4-3.

You can change the aggregation type to any of the following:

- Sum (sum of all aggregated values is presented)
- Maximum (largest value that is included in the aggregation is presented)
- Minimum (smallest value that is included in the aggregation is presented)
- Count (count of all aggregated values is presented)
- Average (average of all aggregated values is presented)
- Standard Deviation (the standard deviation for all aggregated values is presented)
- Variance (the variance for all aggregated values is presented)

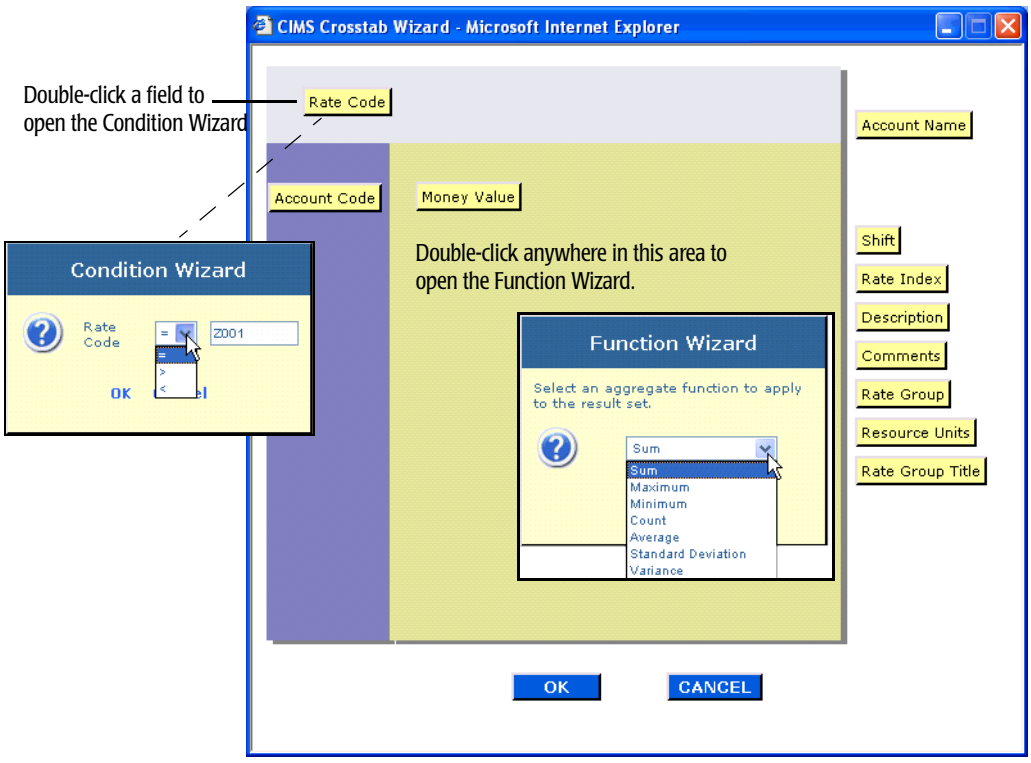


Figure 4-3 • Using the Condition and Function Wizards

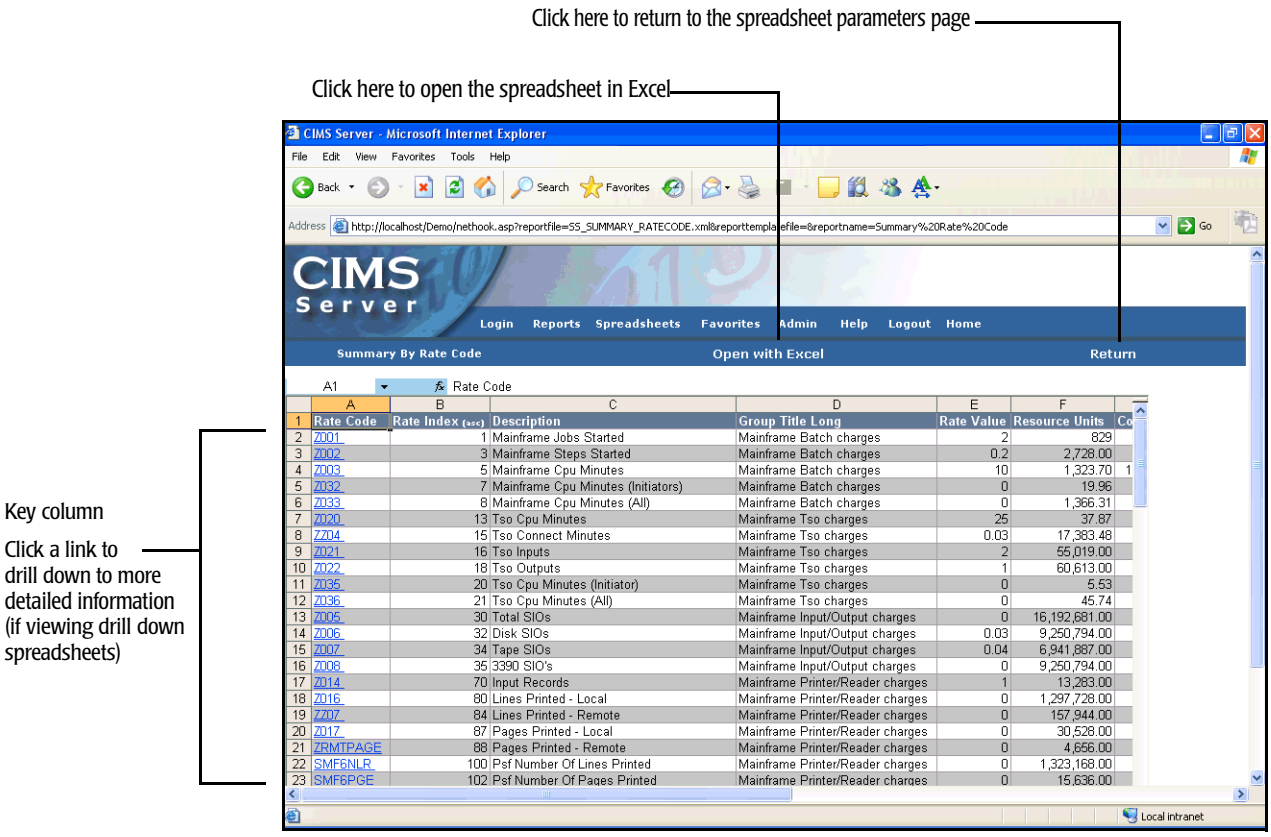
4 Click **OK** to generate the spreadsheet.

Working With CIMS Advanced Spreadsheets

This section describes how to use CIMS Advanced Spreadsheets. When you run a spreadsheet, CIMS Server Web Reporting presents the spreadsheet data in Microsoft Excel within the browser if you have Excel installed on the client running the spreadsheet. If you do not have Excel installed, the data appears in HTML.

About the CIMS Advanced Spreadsheet Interface

Figure 4-4 provides an introduction to the CIMS Advanced Spreadsheets interface. You can view and drill down on data in this interface. If you want to edit, save, or print data, click **Open with Excel**.



Rate Code	Rate Index	Description	Group Title Long	Rate Value	Resource Units
Z001	1	Mainframe Jobs Started	Mainframe Batch charges	2	829
Z002	3	Mainframe Steps Started	Mainframe Batch charges	0.2	2,728.00
Z003	5	Mainframe Cpu Minutes	Mainframe Batch charges	10	1,323.70
Z032	7	Mainframe Cpu Minutes (Initiators)	Mainframe Batch charges	0	19.96
Z033	8	Mainframe Cpu Minutes (All)	Mainframe Batch charges	0	1,366.31
Z020	13	Tso Cpu Minutes	Mainframe Tso charges	25	37.87
Z004	15	Tso Connect Minutes	Mainframe Tso charges	0.03	17,383.48
Z021	16	Tso Inputs	Mainframe Tso charges	2	55,019.00
Z022	18	Tso Outputs	Mainframe Tso charges	1	60,613.00
Z035	20	Tso Cpu Minutes (Initiator)	Mainframe Tso charges	0	5.53
Z036	21	Tso Cpu Minutes (All)	Mainframe Tso charges	0	45.74
Z005	30	Total SIOs	Mainframe Input/Output charges	0	16,192,681.00
Z006	32	Disk SIOs	Mainframe Input/Output charges	0.03	9,250,794.00
Z007	34	Tape SIOs	Mainframe Input/Output charges	0.04	6,941,887.00
Z008	35	3390 SIO's	Mainframe Input/Output charges	0	9,250,794.00
Z014	70	Input Records	Mainframe Printer/Reader charges	1	13,283.00
Z016	80	Lines Printed - Local	Mainframe Printer/Reader charges	0	1,297,728.00
Z017	84	Lines Printed - Remote	Mainframe Printer/Reader charges	0	157,944.00
ZRMTPAGE	87	Pages Printed - Local	Mainframe Printer/Reader charges	0	30,528.00
SMF6NLR	88	Pages Printed - Remote	Mainframe Printer/Reader charges	0	4,656.00
SMF6PGE	100	Psf Number Of Lines Printed	Mainframe Printer/Reader charges	0	1,323,168.00
	102	Psf Number Of Pages Printed	Mainframe Printer/Reader charges	0	15,636.00

Figure 4-4 • CIMS Advanced Spreadsheet Interface

Advanced Spreadsheet Column Description

Table 4-1 provides a description of the columns that appear in the standard advanced spreadsheet fields that are provided with CIMS Server. The columns that appear depend on the default columns for the spreadsheet and any optional columns that were selected when the spreadsheet was generated (see Step 3 on page 4-5).

Your spreadsheets might contain other columns that are custom for your site.

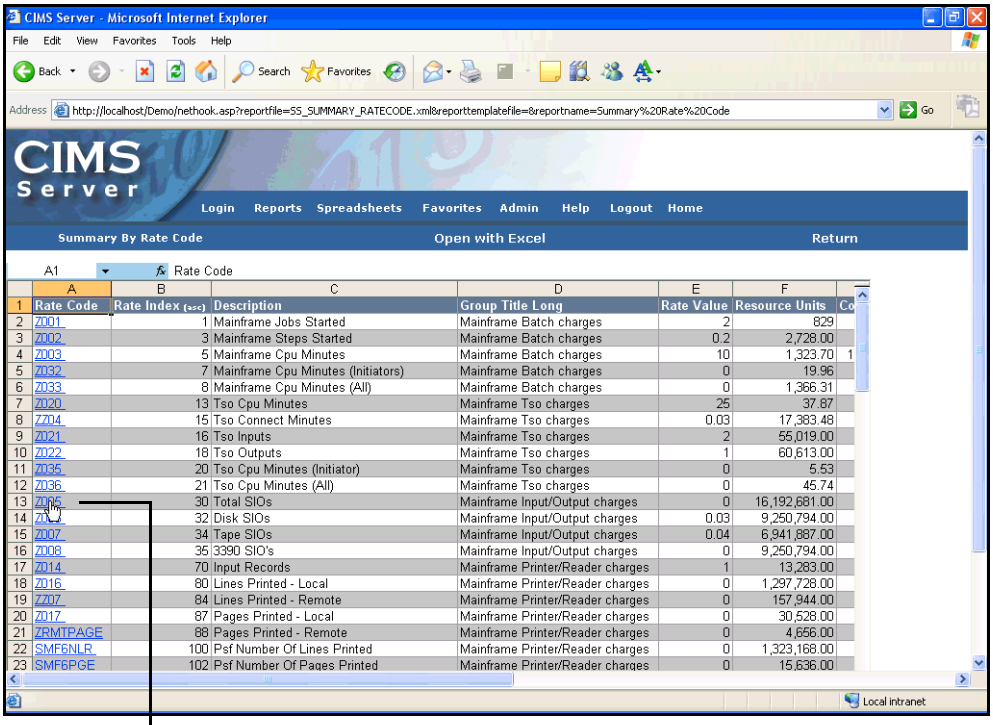
Column	Description
Account Code	Contains account codes.
Rate Code	Contains rate codes. A rate code represents resource units consumed (for example, CPU time used, pages printed, e-mail message sent).
Description	Contains the description for the rate code.
Rate Index	Contains the index number for the rate code. The index number specifies the order in which the rate code appears in reports.
Rate Value	Contains the amount to be charged for the consumption of the resource represented by the rate code.
Group Title Long	Contains the rate group description for the rate code. A rate group description can be a maximum of 255 characters. The rate group description and title can be the same.
Group Title	Contains the rate group title for the rate code. A rate group title can be a maximum of 32 characters.
Resource Units	Contains the number of resource units consumed for the rate code.
Cost	Contains the cost for the resources consumed.
Account Name	Contains account names (if assigned).

Table 4-1 • Standard CIMS Advanced Spreadsheet Columns

Drilling Down in a Spreadsheet

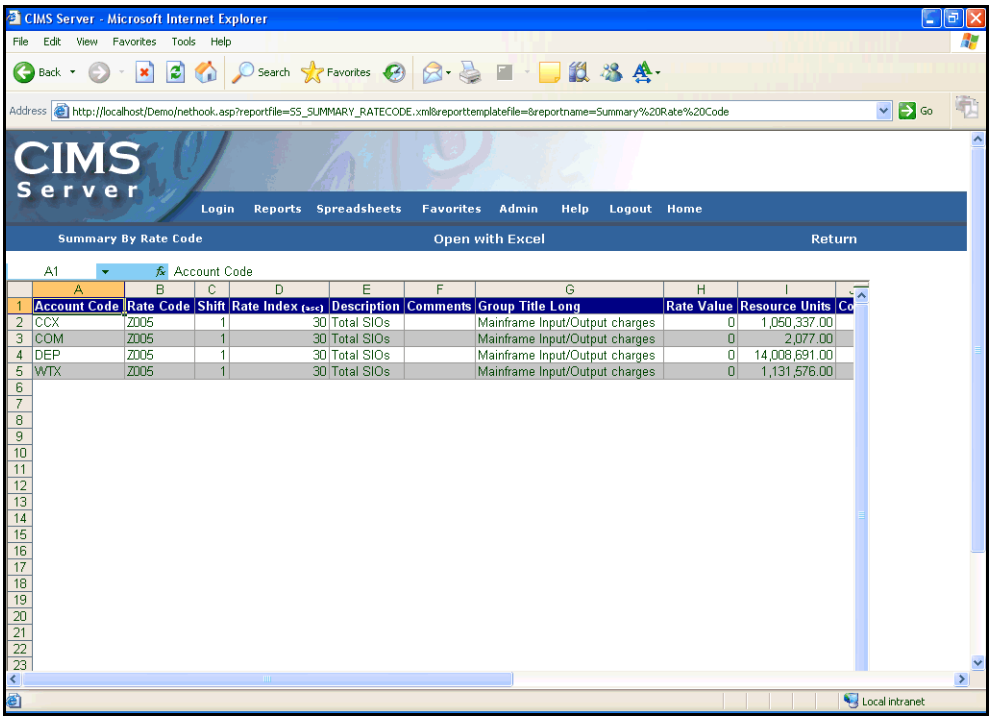
Drill down spreadsheets enable you to drill down on the values in the key column (for example, the Rate Code column in the Summary By Rate Code spreadsheet).

To view detail data for a value, click the link as shown in example Figure 4-5. In this example, the link for the rate code Z005 opens a second spreadsheet with detailed information about the rate code as shown in Figure 4-6 on page 4-11.



	A	B	C	D	E	F
1	Rate Code	Rate Index (asc)	Description	Group Title Long	Rate Value	Resource Units
2	Z001	1	Mainframe Jobs Started	Mainframe Batch charges	2	829
3	Z002	3	Mainframe Steps Started	Mainframe Batch charges	0.2	2,728.00
4	Z003	5	Mainframe Cpu Minutes	Mainframe Batch charges	10	1,323.70
5	Z032	7	Mainframe Cpu Minutes (Initiators)	Mainframe Batch charges	0	19.96
6	Z033	8	Mainframe Cpu Minutes (All)	Mainframe Batch charges	0	1,366.31
7	Z020	13	Tso Cpu Minutes	Mainframe Tso charges	25	37.87
8	ZZ04	15	Tso Connect Minutes	Mainframe Tso charges	0.03	17,383.48
9	Z021	16	Tso Inputs	Mainframe Tso charges	2	55,019.00
10	Z022	18	Tso Outputs	Mainframe Tso charges	1	60,613.00
11	Z035	20	Tso Cpu Minutes (Initiator)	Mainframe Tso charges	0	5.53
12	Z036	21	Tso Cpu Minutes (All)	Mainframe Tso charges	0	45.74
13	Z005	30	Total SIOs	Mainframe Input/Output charges	0	16,192,681.00
14	Z006	32	Disk SIOs	Mainframe Input/Output charges	0.03	9,250,794.00
15	Z007	34	Tape SIOs	Mainframe Input/Output charges	0.04	6,941,887.00
16	Z008	35	3390 SIO's	Mainframe Input/Output charges	0	9,250,794.00
17	Z014	70	Input Records	Mainframe Printer/Reader charges	1	13,283.00
18	Z016	80	Lines Printed - Local	Mainframe Printer/Reader charges	0	1,297,728.00
19	ZZ07	84	Lines Printed - Remote	Mainframe Printer/Reader charges	0	157,944.00
20	Z017	87	Pages Printed - Local	Mainframe Printer/Reader charges	0	30,528.00
21	ZRMTPAGE	88	Pages Printed - Remote	Mainframe Printer/Reader charges	0	4,656.00
22	SMF6NLR	100	Psf Number Of Lines Printed	Mainframe Printer/Reader charges	0	1,323,168.00
23	SMF6PGE	102	Psf Number Of Pages Printed	Mainframe Printer/Reader charges	0	15,636.00

Figure 4-5 • Example Drill Down



	A	B	C	D	E	F	G	H	I
1	Account Code	Rate Code	Shift	Rate Index (sec)	Description	Comments	Group Title Long	Rate Value	Resource Units
2	CCX	Z005	1	30	Total SIOs		Mainframe Input/Output charges	0	1,050,337.00
3	COM	Z005	1	30	Total SIOs		Mainframe Input/Output charges	0	2,077.00
4	DEP	Z005	1	30	Total SIOs		Mainframe Input/Output charges	0	14,008,691.00
5	WTX	Z005	1	30	Total SIOs		Mainframe Input/Output charges	0	1,131,576.00

Figure 4-6 • Example Drill Down

Working With CIMS Advances Spreadsheets in Excel

If you want to print, edit, or save the spreadsheet, you should open the spreadsheet in the Excel.

To open a spreadsheet in Excel:

1 Click **Open with Excel**.

The spreadsheet opens in Excel in a separate Web browser window.

2 Click **View** ▸ **Toolbars** ▸ **Standard**.

3 You can then save, print, and/or edit the spreadsheet using the Excel commands and toolbar.

If you are opening Excel for the first time from CIMS Server Web Reporting:

If you have Excel installed, you might be prompted to download the spreadsheet file the first time that you open Excel from CIMS Server Web Reporting. This enables Windows to recognize the spreadsheet as an `.xls` file and to automatically open Excel in the future.

In the Windows File Download dialog box, do the following:

1 Click **Open**.

2 Click **Select the program from a list**, and then click OK.

3 In the Open With dialog box, click Microsoft Excel or click **Browse** to find Excel, and then click **OK**.

To edit a spreadsheet in Excel:

Edit the spreadsheet as required and then follow the steps in *To save a spreadsheet in Excel:* on page 4-13.

To print a spreadsheet in Excel:

1 Click **File** ▸ **Print** or click the Print button on the Excel toolbar.

To save a spreadsheet in Excel:

You can save advanced spreadsheets that you generate so that you or other users can access the spreadsheet again without regenerating the spreadsheet. For example, if you run a daily spreadsheet that others need to view, you can generate the spreadsheet each day and save it in an accessible drive or folder.

Note • Spreadsheets that involve a wide range of dates or account codes can require excessive system time and resources to generate. Consider saving these spreadsheets for quicker access.

1. Click **File** ▸ **Save As**.
2. Navigate to the folder that you want to save the file in, and then enter the file name and file type in the **File name** and **Save as type** select boxes.
3. Click **Save** to save the file to the location you selected.

To close a spreadsheet in Excel:

Click **File** ▸ **Close** or the Close button.

Standard Advanced Spreadsheet Descriptions

Note • The standard advanced spreadsheets described in this section can be customized for your organization. For more information, see *Creating Custom Advanced Spreadsheets* on page 5-12.

This section describes the standard advanced spreadsheets that are provided with CIMS Server. Each spreadsheet description includes the following information:

XML File Name — The name of *XML* definition file for the spreadsheet.

Stored Procedure — The stored procedure used for the spreadsheet. A stored procedure is a set of SQL statements that can perform both queries and actions that allow the system to generate spreadsheets.

Key Column — The column by which all other columns in the spreadsheet are sorted. For example, the Rate Code column in the Summary By Rate Code spreadsheet or the Account Code column in the Summary By Account Code spreadsheet.

If you are viewing a drill down spreadsheet, you can drill down on the values in the key column to view detailed data for that value.

Parameters — The parameters for the spreadsheet. For a description of these parameters, see Step 2 on page 4-4

Columns — The default and optional columns for the spreadsheet.

Complete Summary View

This spreadsheet shows a break down of resource units consumed and charges by rate code for each account code for the parameters selected. This spreadsheet does not include drill down.

XML file name: `SS_SUMMARY_COMPLETE.xml`

Stored Procedure: `CIMSSP_Summary`

Key Column: Account Code

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Date Range

Spreadsheet Columns (one or more of the following must be selected):

- Account Code
- Rate Code (optional)
- Rate Index (optional)
- Description (optional)
- Group Title (optional)
- Rate Value (optional)
- Resource Units (optional)
- Cost (optional)

Complete Summary View Example

Figure 4-7 provides an example of the parameters and columns used to create a Complete Summary View spreadsheet.

Figure 4-8 on page 4-17 shows the resulting spreadsheet.

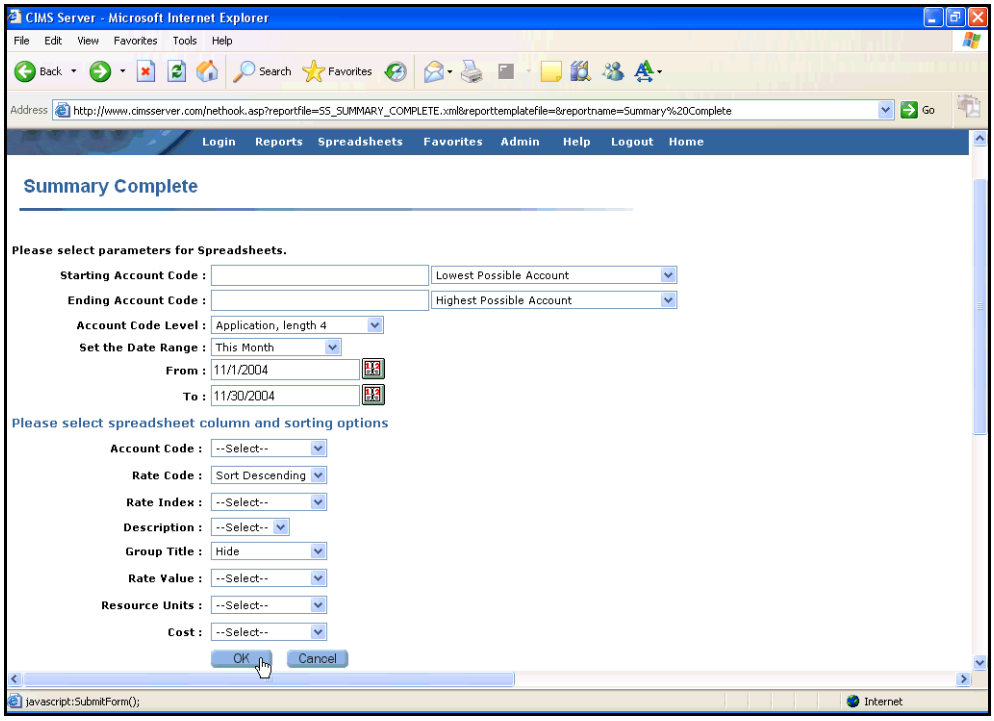
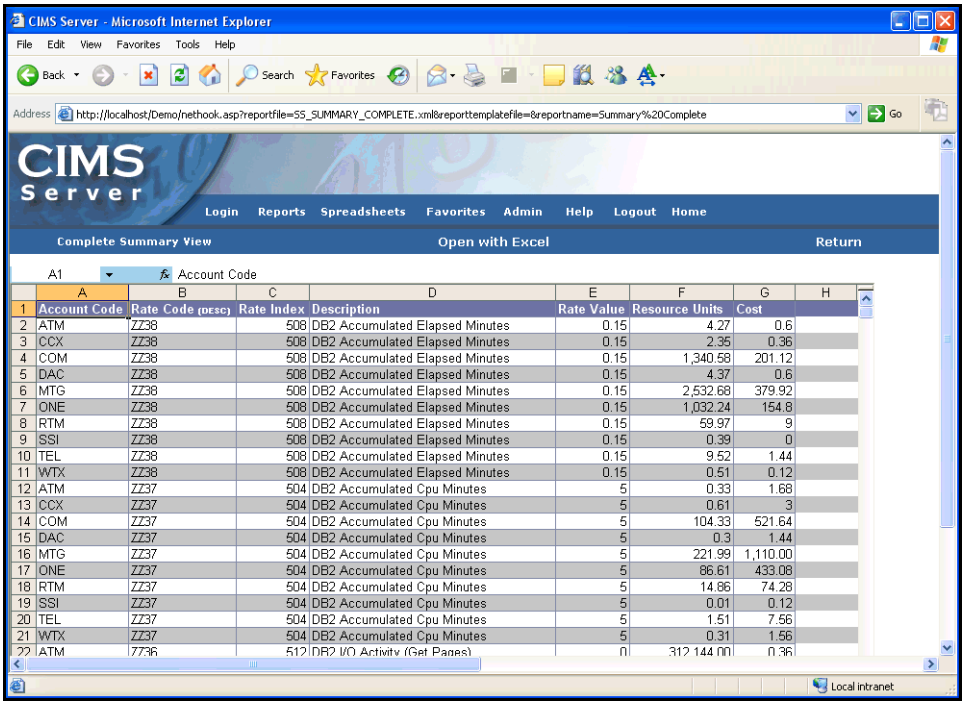


Figure 4-7 • Example Setup for the Complete Summary View Spreadsheet



	A	B	C	D	E	F	G	H
1	Account Code	Rate Code (DESC)	Rate Index	Description	Rate Value	Resource Units	Cost	
2	ATM	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	4.27	0.6	
3	CCX	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	2.35	0.36	
4	COM	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	1,340.58	201.12	
5	DAC	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	4.37	0.6	
6	MTG	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	2,532.68	379.92	
7	ONE	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	1,032.24	154.8	
8	RTM	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	59.97	9	
9	SSI	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	0.39	0	
10	TEL	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	9.52	1.44	
11	WTX	ZZ38	508	DB2 Accumulated Elapsed Minutes	0.15	0.51	0.12	
12	ATM	ZZ37	504	DB2 Accumulated Cpu Minutes	5	0.33	1.68	
13	CCX	ZZ37	504	DB2 Accumulated Cpu Minutes	5	0.61	3	
14	COM	ZZ37	504	DB2 Accumulated Cpu Minutes	5	104.33	521.64	
15	DAC	ZZ37	504	DB2 Accumulated Cpu Minutes	5	0.3	1.44	
16	MTG	ZZ37	504	DB2 Accumulated Cpu Minutes	5	221.99	1,110.00	
17	ONE	ZZ37	504	DB2 Accumulated Cpu Minutes	5	86.61	433.08	
18	RTM	ZZ37	504	DB2 Accumulated Cpu Minutes	5	14.86	74.28	
19	SSI	ZZ37	504	DB2 Accumulated Cpu Minutes	5	0.01	0.12	
20	TEL	ZZ37	504	DB2 Accumulated Cpu Minutes	5	1.51	7.56	
21	WTX	ZZ37	504	DB2 Accumulated Cpu Minutes	5	0.31	1.56	
22	ATM	ZZ36	512	DB2 I/O Activity (Get Pages)	0	312,144.00	0.36	

Figure 4-8 • Example Complete Summary View Spreadsheet

Summary By Account Code

This spreadsheet shows a summary of resource units consumed and charges by account code for the parameters selected. You can drill down on the account code to view a break down of the resource usage and charges by rate code.

XML file name: `SS_SUMMARY_ACCOUNTCODE.xml`

Stored Procedure: `CIMSSP_Summary`

Key Column: Account Code

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Date Range

Top-level Spreadsheet Columns:

- Account Code
- Resource Units
- Cost
- Account Name

Drill Down Spreadsheet Columns:

- Account Code
- Rate Code
- Rate Index
- Description (optional)
- Comments
- Rate Group (optional)
- Group Title Long (optional)
- Rate Value (optional)
- Resource Units
- Cost
- Account Name

Summary By Account Code Example

Figure 4-9 provides an example of the parameters and columns used to create a Summary By Account Code spreadsheet.

Figure 4-10 shows the resulting spreadsheet.

Figure 4-11 on page 4-20 shows an example drill down.

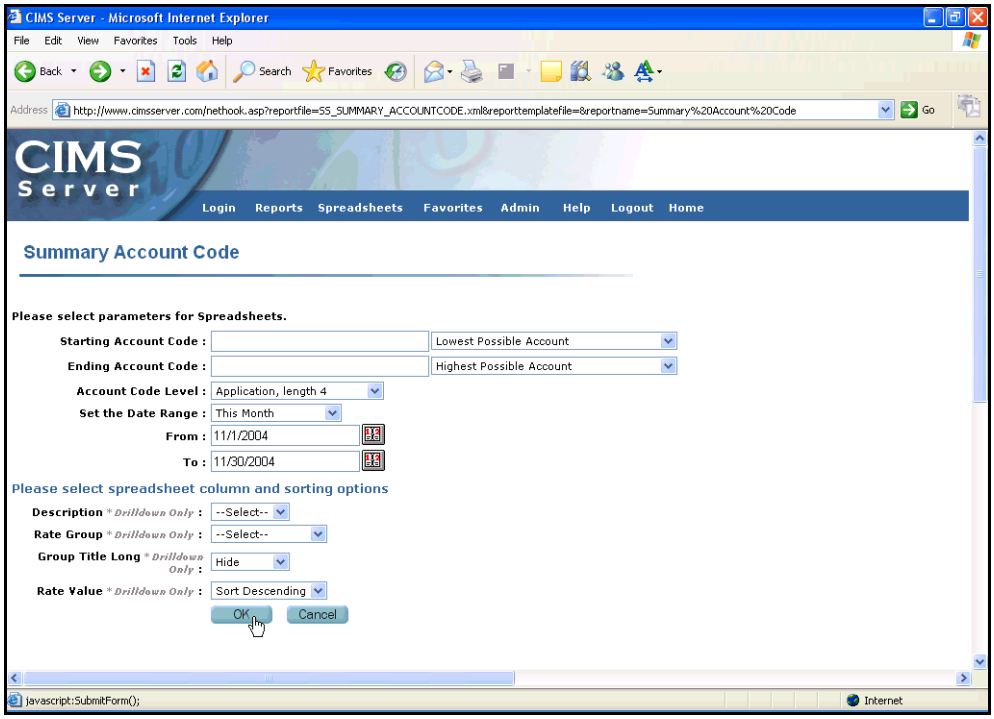
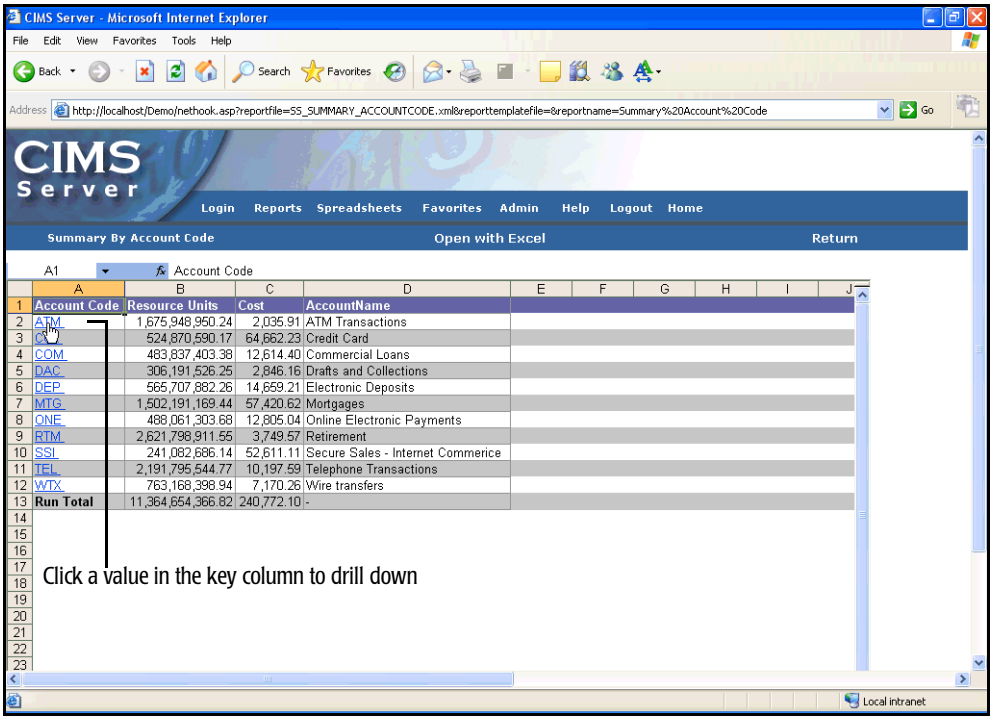
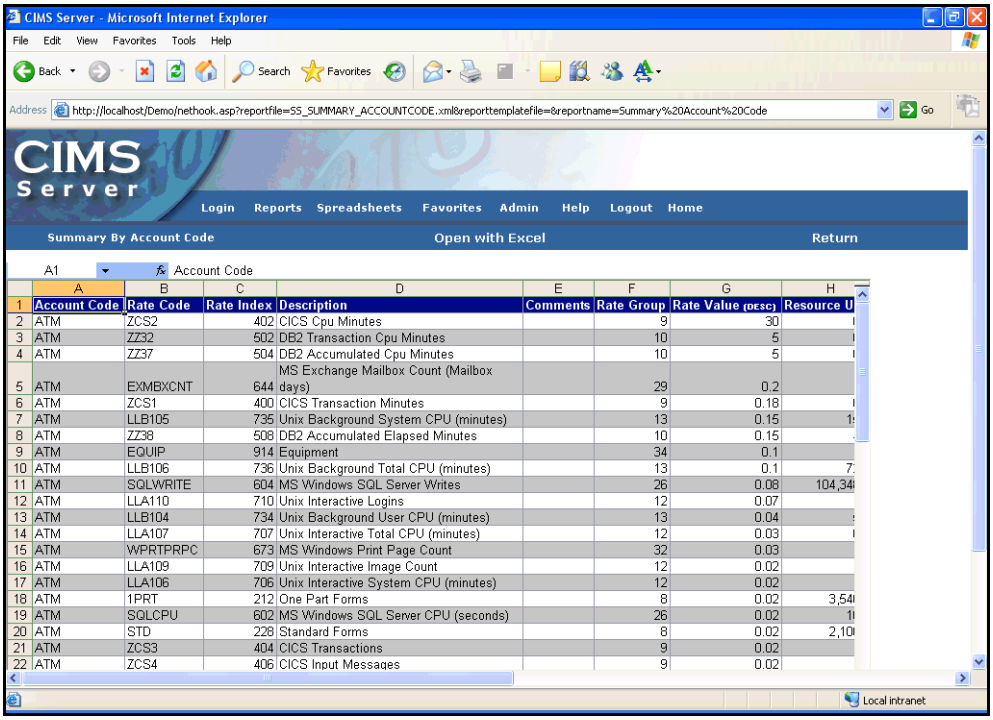


Figure 4-9 • Example Setup for the Summary By Account Code Spreadsheet



	Account Code	Resource Units	Cost	AccountName
2	ATM	1,675,948,950.24	2,035.91	ATM Transactions
3	CC	524,870,590.17	64,862.23	Credit Card
4	COM	483,837,403.38	12,614.40	Commercial Loans
5	DAC	306,191,526.25	2,846.16	Drafts and Collections
6	DEP	565,707,882.26	14,659.21	Electronic Deposits
7	MTG	1,502,191,169.44	57,420.62	Mortgages
8	ONE	488,061,303.68	12,805.04	Online Electronic Payments
9	RTM	2,621,798,911.55	3,749.57	Retirement
10	SSI	241,082,686.14	52,611.11	Secure Sales - Internet Commerice
11	TEL	2,191,795,544.77	10,197.59	Telephone Transactions
12	WTX	763,168,398.94	7,170.26	Wire transfers
13	Run Total	11,364,654,366.82	240,772.10	-

Figure 4-10 • Example Summary By Account Code Spreadsheet



	Account Code	Rate Code	Rate Index	Description	Comments	Rate Group	Rate Value (DESC)	Resource U
2	ATM	ZCS2	402	CICS Cpu Minutes		9	30	
3	ATM	ZZ32	502	DB2 Transaction Cpu Minutes		10	5	
4	ATM	ZZ37	504	DB2 Accumulated Cpu Minutes		10	5	
5	ATM	EXMBXCNT	644	MS Exchange Mailbox Count (Mailbox days)		29	0.2	
6	ATM	ZCS1	400	CICS Transaction Minutes		9	0.18	
7	ATM	LLB105	735	Unix Background System CPU (minutes)		13	0.15	
8	ATM	ZZ38	508	DB2 Accumulated Elapsed Minutes		10	0.15	
9	ATM	EQUIP	914	Equipment		34	0.1	
10	ATM	LLB106	736	Unix Background Total CPU (minutes)		13	0.1	
11	ATM	SQLWRITE	604	MS Windows SQL Server Writes		26	0.08	
12	ATM	LLA110	710	Unix Interactive Logins		12	0.07	
13	ATM	LLB104	734	Unix Background User CPU (minutes)		13	0.04	
14	ATM	LLA107	707	Unix Interactive Total CPU (minutes)		12	0.03	
15	ATM	WPRTPRPC	673	MS Windows Print Page Count		32	0.03	
16	ATM	LLA109	709	Unix Interactive Image Count		12	0.02	
17	ATM	LLA106	706	Unix Interactive System CPU (minutes)		12	0.02	
18	ATM	1PRT	212	One Part Forms		8	0.02	
19	ATM	SQLCPU	602	MS Windows SQL Server CPU (seconds)		26	0.02	
20	ATM	STD	228	Standard Forms		8	0.02	
21	ATM	ZCS3	404	CICS Transactions		9	0.02	
22	ATM	ZCS4	406	CICS Input Messages		9	0.02	

Figure 4-11 • Example Summary By Account Code Drill Down

Summary By Rate Code

This spreadsheet shows a summary of resource units consumed and charges by rate code for the parameters selected. You can drill down on the rate code to view a break down of the resource usage and charges for the rate code by account code.

XML file name: `SS_SUMMARY_RATECODE.xml`

Stored Procedure: `CIMSSP_Summary`

Key Column: Rate Code

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Date Range

Top-level Spreadsheet Columns:

- Rate Code
- Rate Index
- Rate Description (optional)
- Group Title Long (optional)
- Rate Value (optional)
- Resource Units
- Cost

Drill Down Spreadsheet Columns:

- Account Code
- Rate Code
- Shift
- Rate Index
- Description (optional)
- Comments
- Group Title Long (optional)
- Rate Value (optional)
- Resource Units
- Cost

Summary By Rate Code Example

Figure 4-12 provides an example of the parameters and columns used to create a Summary By Rate Code spreadsheet.

Figure 4-13 on page 4-23 shows the resulting spreadsheet.

Figure 4-14 on page 4-23 shows an example drill down.

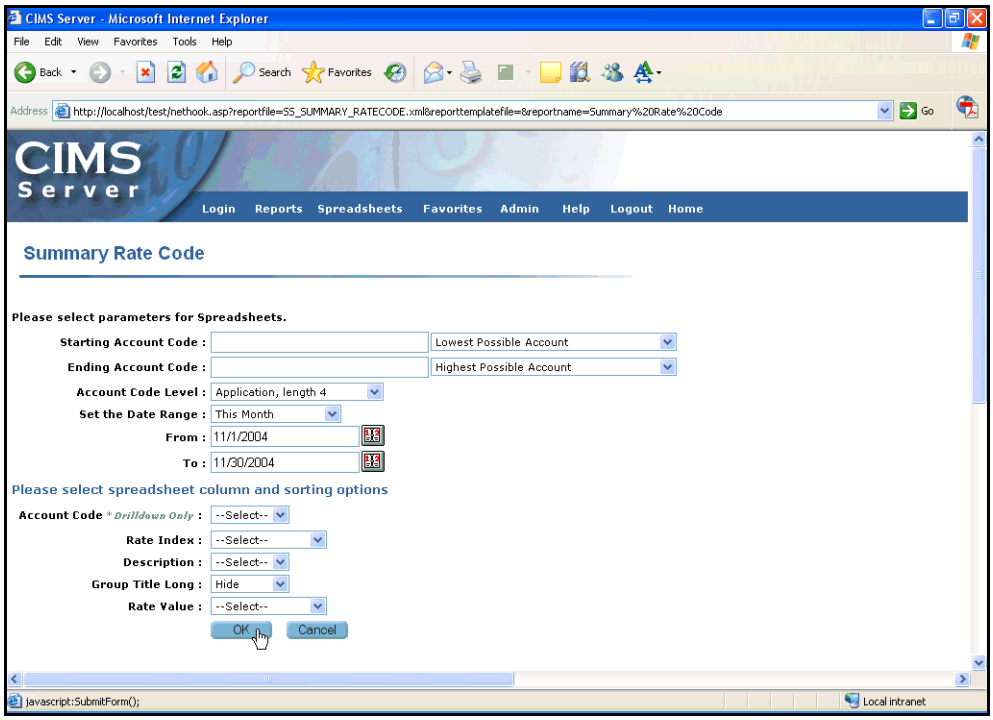


Figure 4-12 • Example Setup for the Summary By Rate Code Spreadsheet

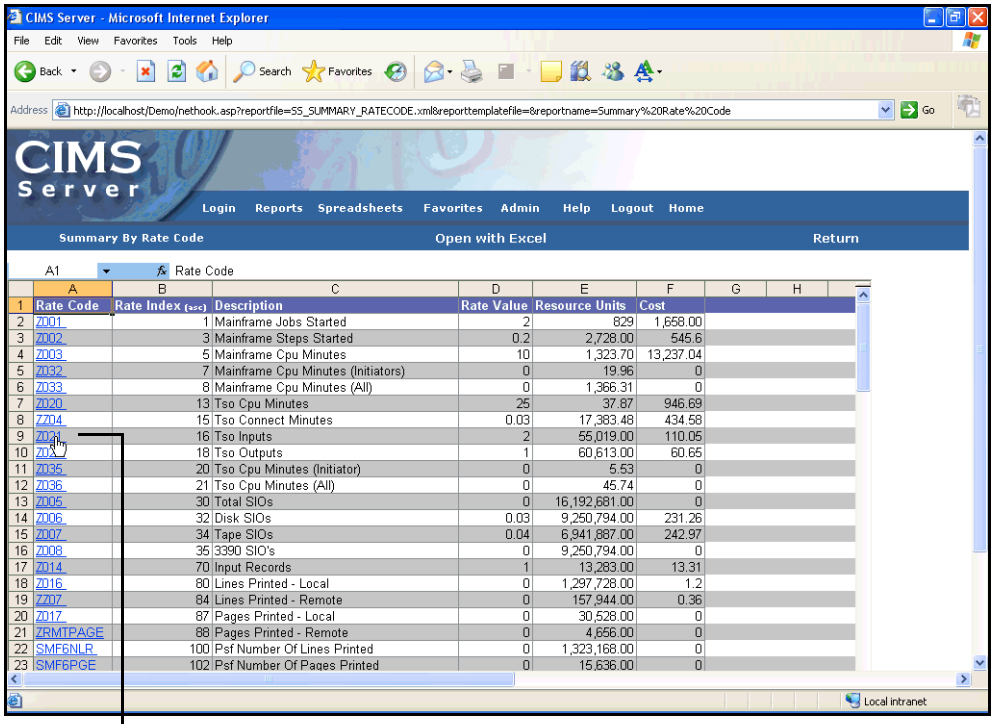


Figure 4-13 • Example Summary By Rate Code Spreadsheet

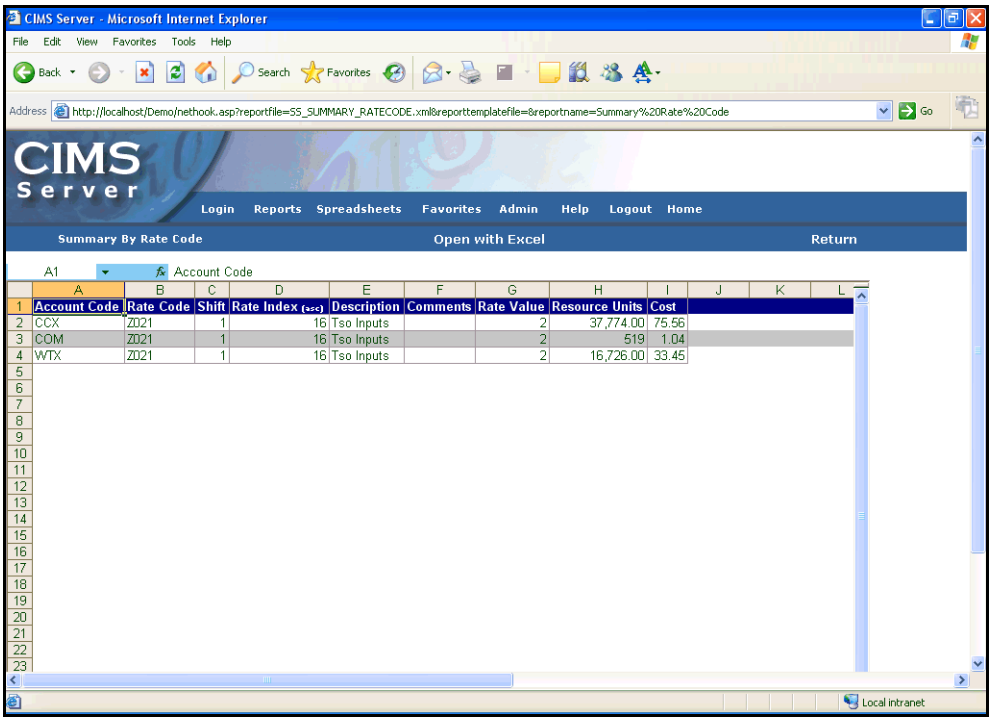


Figure 4-14 • Example Summary By Rate Code Drill Down

Summary By Rate Group

This spreadsheet shows a summary of resource units consumed and charges by rate group for the parameters selected. You can drill down on the rate group to view a break down of the resource usage and charges for the rate group by account code and rate code.

XML file name: `SS_SUMMARY_RATEGROUP.xml`

Stored Procedure: `CIMSSP_Summary`

Key Column: Rate Group

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Date Range

Top-level Spreadsheet Columns:

- Group Title Long
- Resource Units
- Cost

Drill Down Spreadsheet Columns:

- Account Code
- Rate Code
- Rate Index
- Description (optional)
- Comments
- Group Title Long (optional)
- Rate Value (optional)
- Resource Units
- Cost

Summary By Rate Group Example

Figure 4-15 provides an example of the parameters and columns used to create a Summary By Rate Group spreadsheet.

Figure 4-16 on page 4-26 shows the resulting spreadsheet.

Figure 4-17 on page 4-26 shows an example drill down.

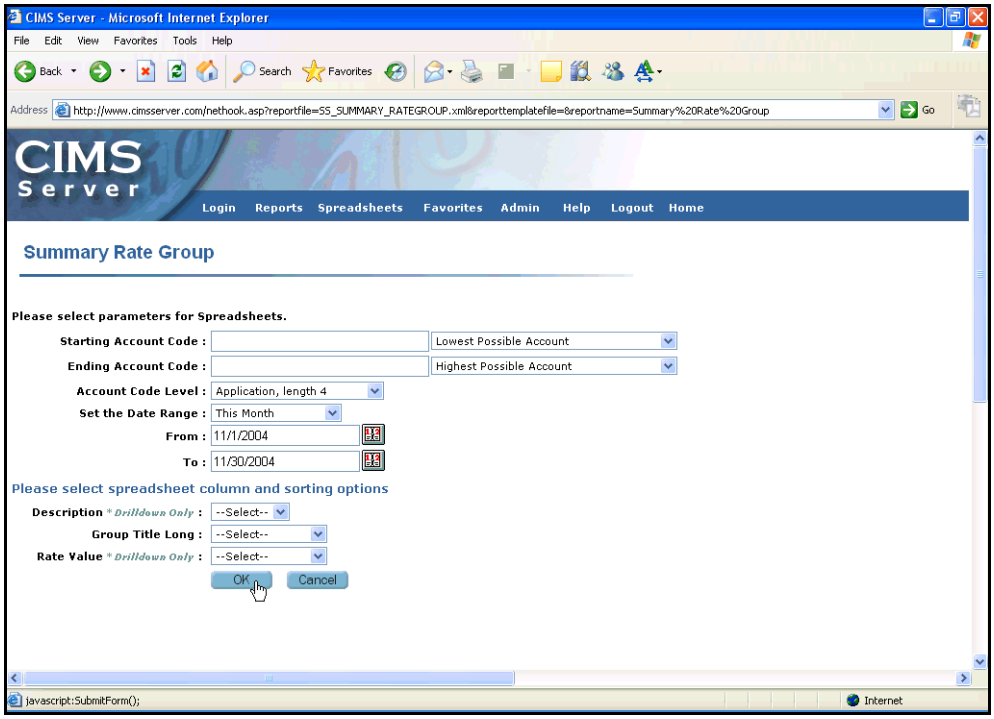


Figure 4-15 • Example Setup for the Summary By Rate Group Spreadsheet

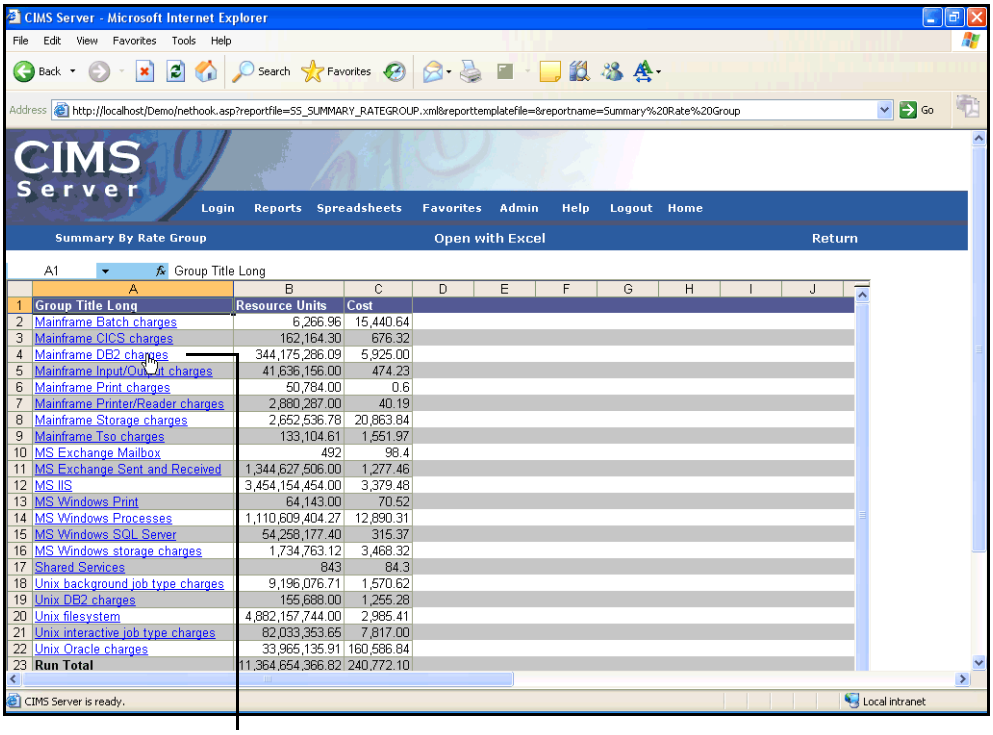


Figure 4-16 • Example Summary By Rate Group Spreadsheet

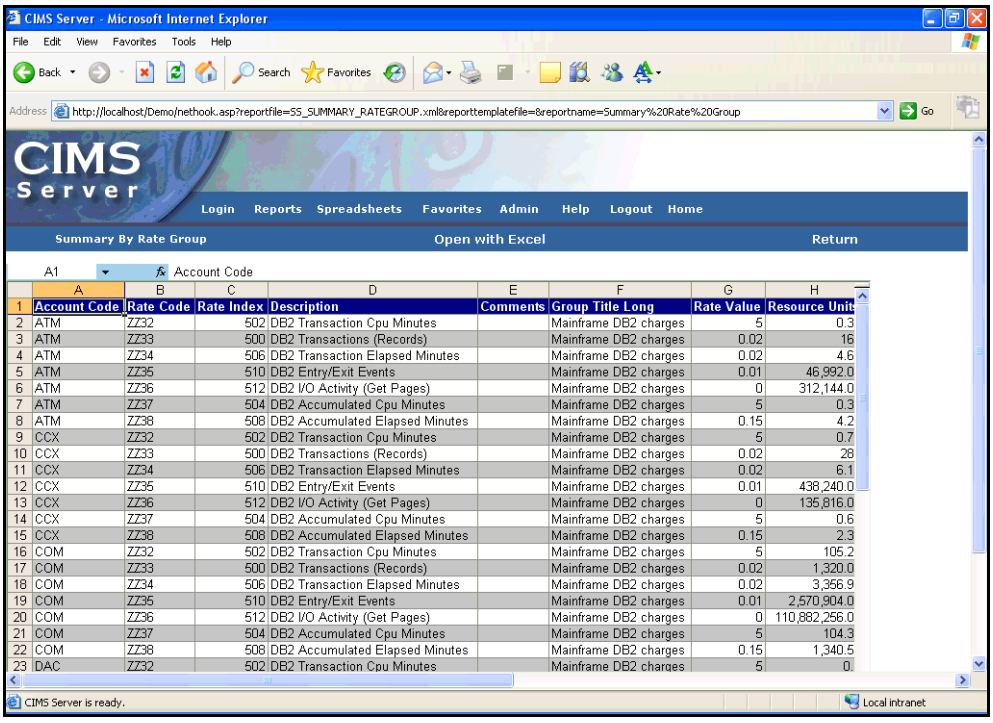


Figure 4-17 • Example Summary By Rate Group Drill Down

Crosstab Spreadsheet

The data that appears in this spreadsheet is user-defined. The CIMS Crosstab Wizard is used to generate this spreadsheet. This wizard enables users to dynamically change rows and columns to see different summaries of data. For more information, see *Running a Crosstab Advanced Spreadsheet* on page 4-6.

XML file name: `SS_CRTAB.xml`

Stored Procedure: `CIMSSP_Summary`

Key Column: User-defined

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Date Range

Possible Spreadsheet Fields

- Rate Code
- Account Name
- Money Value
- Account Code
- Shift
- Rate Index
- Description
- Comments
- Rate Group
- Resource Units
- Rate Group Title

Crosstab Spreadsheet Example

Figure 4-18 shows the fields selected for the spreadsheet in the CIMS Crosstab Wizard.

Figure 4-19 and Figure 4-20 on page 4-29 show the resulting spreadsheet and an example drill down.

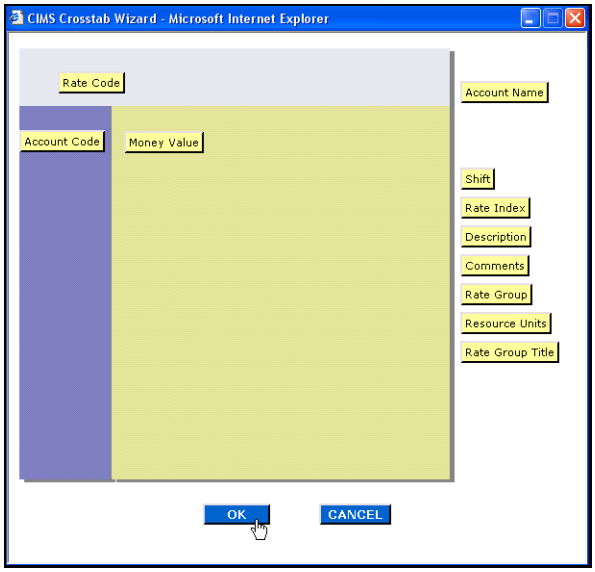


Figure 4-18 • Example Crosstab Spreadsheet Wizard

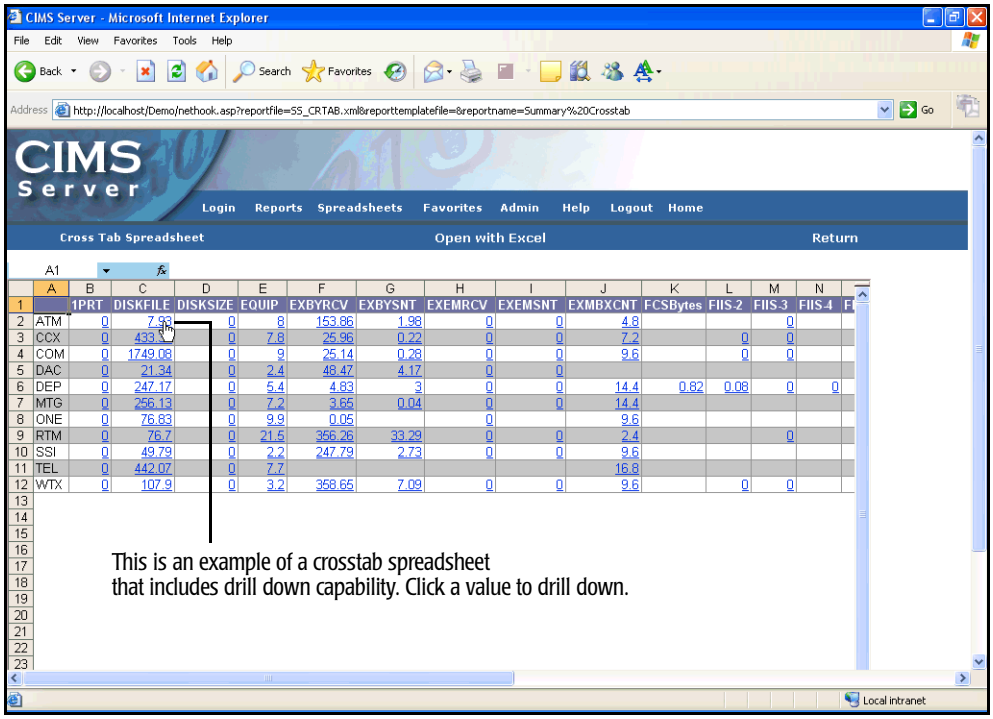


Figure 4-19 • Example Summary Crosstab Spreadsheet

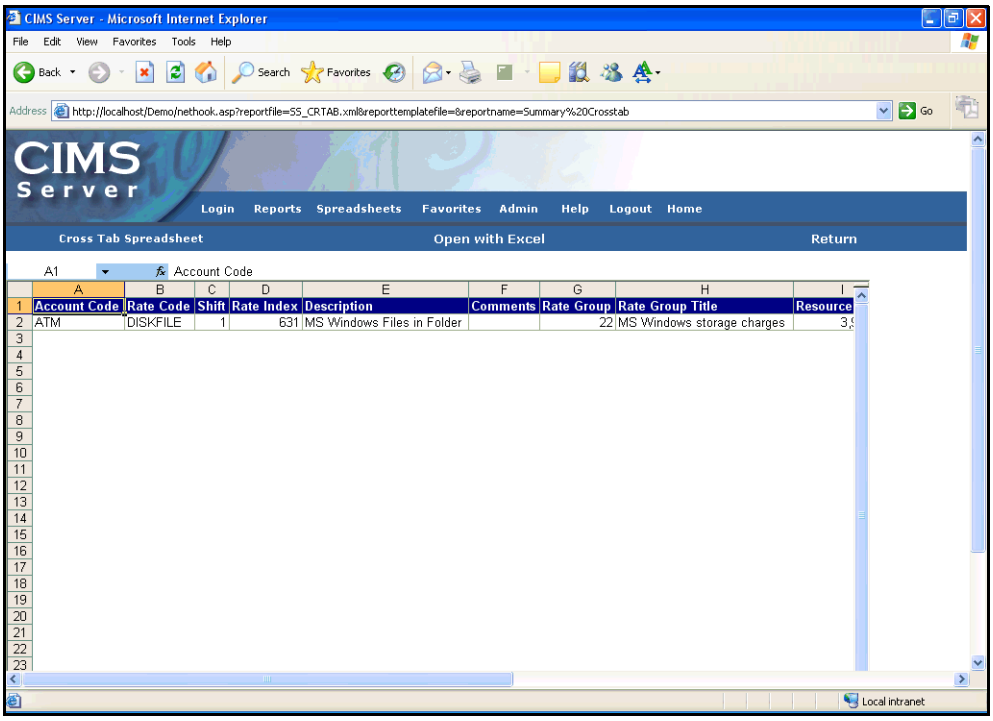


Figure 4-20 • Example Summary Crosstab Drill Down

5

Administering CIMS Server Web Reporting

This chapter describes user-specific and system-wide configuration settings for CIMS Server Web Reporting. It also provides information about other administrative tasks such as creating custom report parameters and customizing CIMS Advanced Spreadsheets.

Note • For simplicity, the procedures in this section reflect commands for reports. However, these procedures are also applicable to spreadsheets. For example, if you are instructed to click Favorites ▸ Add ▸ Reports, the corresponding sequence for spreadsheets is Favorites ▸ Add ▸ Spreadsheets.

Configuring User-Specific Settings 5-2

Working With Favorite Reports 5-2

Showing or Hiding Folder Paths for Published Reports 5-5

Selecting an Account Code Structure for Reports 5-5

Choosing a Crystal Report Viewer 5-6

Changing Your E-mail Address 5-7

Resetting the Browser 5-7

Configuring System-Wide Settings 5-8

Creating Custom Report and Transaction Parameters 5-11

Creating Parameters Using ASP.NET 5-11

Creating Parameters Using Parameter Fields 5-11

Creating Custom Advanced Spreadsheets 5-12

About the XML Spreadsheet Definition File Structure 5-13

Configuring User-Specific Settings

The settings described in this section can be different for each CIMS Web user. These settings are not applied system wide.

Working With Favorite Reports

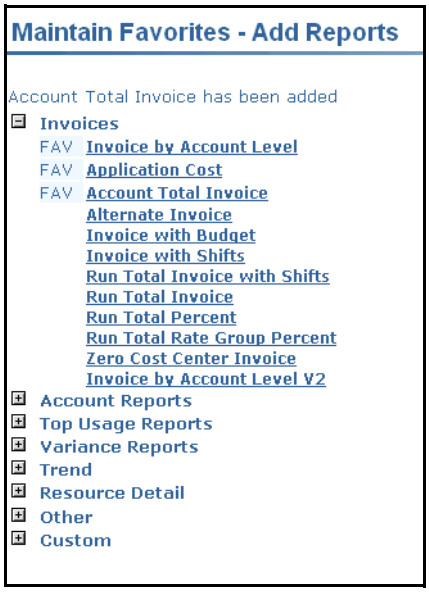
You can designate reports as favorite reports. This feature enables you to easily access favorite reports from the Favorites page (see Figure 5-2 on page 5-4) or from shortcuts in the left frame of the home page (see Figure 5-1 on page 5-3).

Note • Although you can designate multiple reports as favorites, only the first five reports that you add as favorites will appear on the home page.

To add a report as a favorite:

1. Click **Favorites ▸ Add ▸ Reports**.
2. On the Maintain Favorites–Add Reports page, expand the report group that contains the report that you want, and then click the report.

The report is designated as a favorite as shown in example Figure 5-1 and appears on the Favorites page (see Figure 5-2 on page 5-4).



Note • When you add a report as a favorite, any published reports created from that report are also automatically included as favorites if the default file name was used when the published reports were created (see *Publishing Reports* on page 2-12). If a file name other than the default was used for a published report, the system will not add the report as a favorite and you cannot add the report manually.

To access a favorite report from a shortcut:

Click the report link in the left frame of the home page (see Figure 5-1). If the report has a correlating published report for the current period, the most current published report opens.

If the favorite report *does not* have a correlating published report for the current period, the parameters page for the report opens.

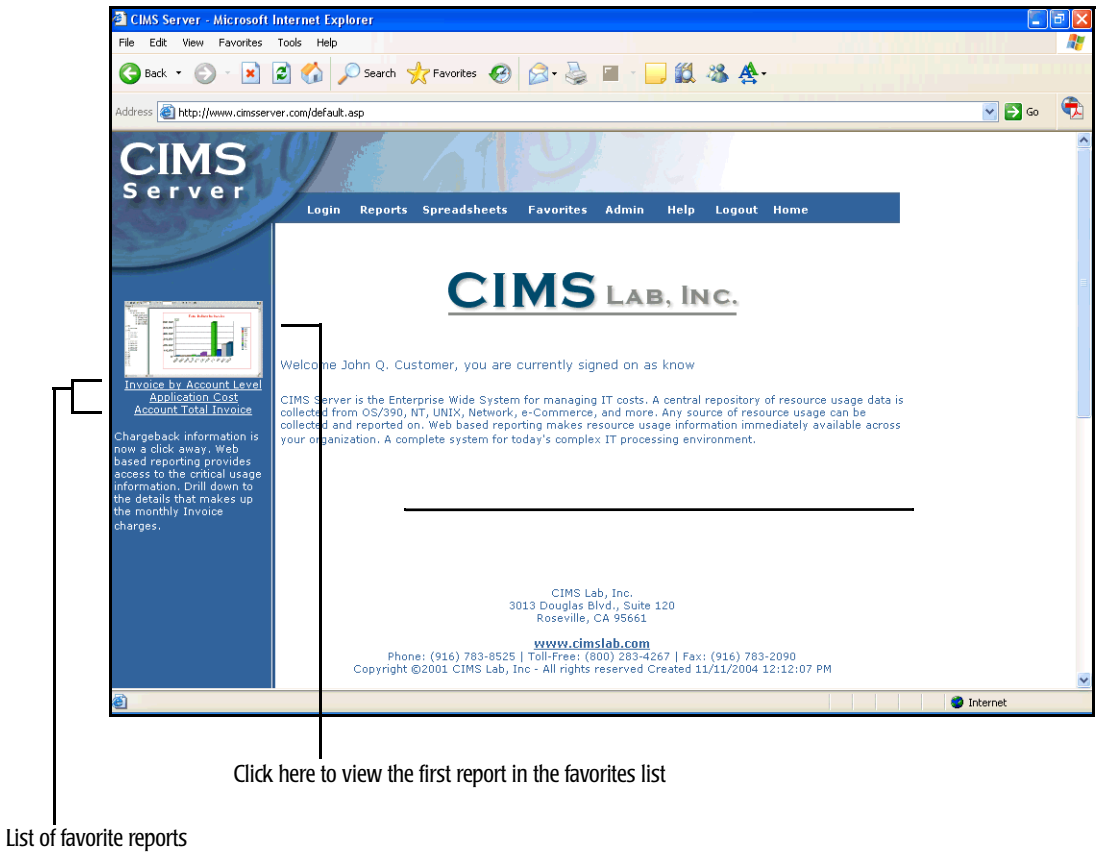


Figure 5-1 • Favorite Report Links

To access a favorite report from the Favorites page:

1 Click **Favorites** ▸ **Reports**.

The Favorites page opens displaying a hierarchy of reports that you have saved as favorites.

2 Navigate to the appropriate report (see Figure 5-2) and expand it.

3 Do one of the following:

- Click **Run Report** to run the report.
- Click a published report (if available) to view the report. You can hide or display the folder path that appears for the published report. See *Showing or Hiding Folder Paths for Published Reports* on page 5-5.

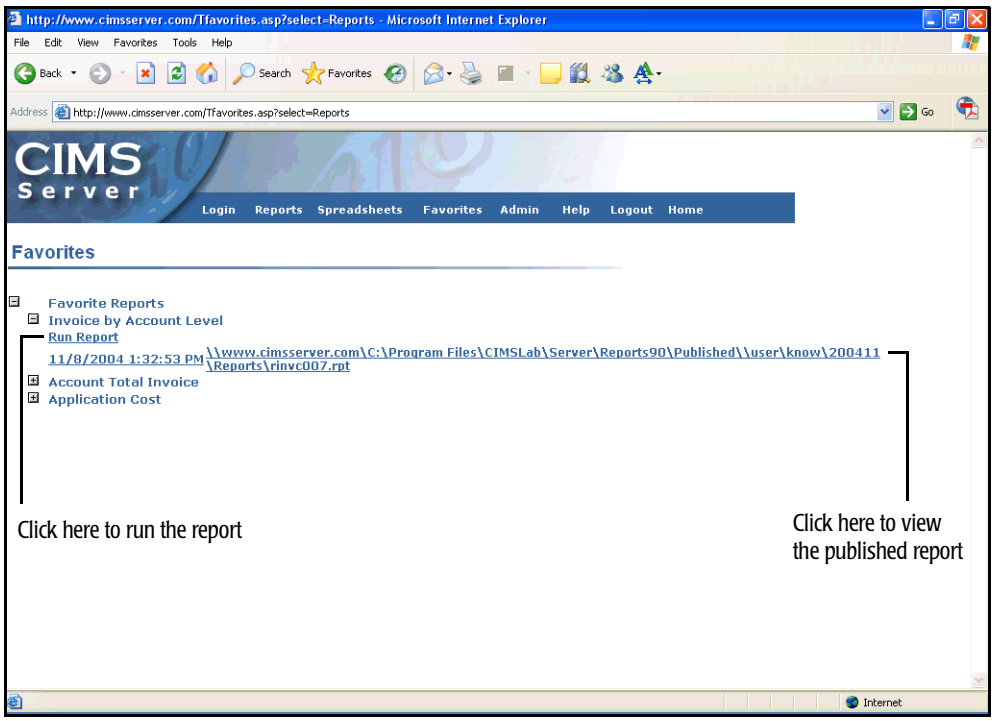


Figure 5-2 • Navigating to a Favorite Report

To remove a favorite report:

1 Click **Favorites** ▸ **Delete**.

2 On the Maintain Favorites–Remove Reports page, click the report that you want to remove.

The report is removed from Favorites list.

Note • Removing a favorite report simply removes the report from your list of favorites. *It does not delete the report from the system.*

Showing or Hiding Folder Paths for Published Reports

By default, published reports that appear on the Published Reports and Favorites pages include the full path to the folder that contains the report. You can choose to show or hide these paths.

To hide or display folder paths of reports:

1. Click **Admin** ▸ **User Options**.
2. On the Set User Options page, do the following:
   - To show the full folder paths on the Published Reports and/or Favorites pages, click **Y** in the appropriate box.
   - To hide folder paths, click **N** in the appropriate box.
3. Click **Update**.

The system shows or hides the directory paths as you requested.

Selecting an Account Code Structure for Reports

If your CIMS Server administrator has assigned multiple account code structures to your user group, you can choose the account structure that you want to appear in reports.

To select the account code structure:

1. Click **Admin** ▸ **User Options**.
2. On the Set User Options page, click the account code structure that you want to use in the **Account Code Structure** select box.

Choosing a Crystal Report Viewer

In most cases, your CIMS Server administrator will have set the appropriate Crystal Report viewer for your browser. (For more information, refer to the *CIMS Server Administrator's Guide*.) However, you can change the viewer as needed from CIMS Server Web Reporting. The viewer that you select should be based on the specifics of your browser and computer. For the advantages and disadvantages of each viewer, see page 5-8.

Note • If you are using SQL Server Reporting Services for reporting, use the Default viewer.

To choose a Crystal Report viewer:

Note • The following steps are applicable to selecting a viewer for an individual CIMS Web user only. To set the viewer for all users, see *Configuring System-Wide Settings* on page 5-8. CIMS Server Web Reporting uses the viewer set for the individual user if it differs from viewer set for all users.

1 Click **Admin ▸ User Options**.

2 On the Set User Options page, click one of the following in the **Crystal Web Viewer** select box:

- **Default.** This option uses the viewer set on the Edit Configuration page (see page 5-8).
- **ActiveX.** This option works only in Internet Explorer.
- **Java using Browser JVM**. This option works in Netscape Navigator or Internet Explorer. This viewer requires the Java Virtual Machine. Because this viewer might be more difficult to set up, CIMS Lab recommends that you use the HTML or ActiveX viewer.
- **HTML**. This option is appropriate for users with lower powered computers with minimal memory (64MB or less). It offers a smaller feature set.

3 Click **Update** to change the viewer.

Changing Your E-mail Address

CIMS Server includes an automatic report distribution feature. If your CIMS Server administrator has enabled this feature for your user ID or user group, you will receive published reports via e-mail. Your CIMS Server administrator determines the reports that you will receive.

If needed, you can change the e-mail address at which you receive reports. To change your e-mail address:

1. Click **Admin ▸ User Options**.
2. In the **Email Address** box, type your e-mail address, and then click **Update**.

For more information about publishing and distributing reports in batch, refer to the *CIMS Server Administrator's Guide*.

Resetting the Browser

Important! • You should reset the browser only after consulting CIMS Lab. This feature is for debugging purposes only.

You can reset your browser to the default values by clicking **Admin ▸ User Options** and then clicking **OK** under **Browser Reset**.

Configuring System-Wide Settings

You must be a CIMS Web administrator to edit the configuration settings described in the section. If you are not an administrator, you can view these settings in a read-only capacity.

These configuration settings are saved to the CIMS Server database and are applied to *all* CIMS Web users.

Note • Many of these settings can also be configured using CIMS Server Administrator.

To edit the configuration settings:

1 Click **Admin ▸ Configuration**.

2 Edit the settings on the Edit Configuration page as follows:

- **Data Source ID (not editable).** This is a data source ID or `Default`. For more information about using data source IDs, refer to the *CIMS Server Administrator's Guide*.
- **ODBC DSN (not editable).** The name of the ODBC-compliant data source that CIMS Server Web Reporting is using.
- **Localization ID (LCID) (not editable).** The LCID assigned to the user's regional setting in Windows.
- **Organization Name and Address Fields**. Address information for your organization (maximum of 255 characters for each box). This information appears in the standard invoices that ship with CIMS Server.
- **Path to Standard/Custom/Published Reports Folder.** The paths to the folders that contains the standard, custom, and published reports used for Web reporting (maximum of 255 characters for each box).
- **Invoice Number**. This invoice number is used only if the **Invoice Number** report parameter is not available (see page 2-5).
- **Session Timeout Minutes**. The number of minutes of inactivity that are allowed before users are automatically logged out of CIMS Server Web Reporting. The minimum is 1 minute and the maximum is 9999 minutes. The default is 60 minutes.

Note • If you change this setting, the change will not take effect during the same session. You need to log out and the log on again.

- **Crystal Web Viewer.** This setting determines the particular Crystal Viewer used to view reports. You can choose one of the following:

  Note • If you are using SQL Server Reporting Services for reporting, leave this box set to Default.

  - **Default.** If you are using Crystal Reports 9 or 10, the default is the HTML viewer. If you are using Crystal Reports 8.5, the default is the ActiveX viewer.
  - **ActiveX.** This option works only in Internet Explorer. This viewer has the following advantages and disadvantages:

    Advantage: This viewer provides more features than the HTML viewer provides.

    Disadvantage: This viewer requires that the Crystal Smart Viewer for ActiveX be installed on the user's computer (for more information, refer to the *CIMS Server Administrator's Guide*). The user might not have the administrative privileges required to install and run the viewer.
  - **Java using Browser JVM.** This option works in Netscape Navigator or Internet Explorer. This viewer requires the Java Virtual Machine. Because this viewer might be more difficult to set up, CIMS Lab recommends that you use the HTML or ActiveX viewer.
  - **HTML.** This option works in Internet Explorer or Netscape Navigator. This viewer has the following advantages and disadvantages:

    Advantage: This viewer works with any browser and does not require any additional files or set up.

    Disadvantage: This viewer provides less features than the ActiveX viewer provides.

- **Display Account Code Selection to Level.** This setting determines the level of account codes that appear in the **Starting Account Code** and **Ending Account Code** lists on a report parameters page. For example, if you type `1`, only the top level account codes appear. However, if you type `3`, the first, second, and third level account codes appear.
- **Current Database Version (not editable)**. The version of the CIMS database currently used by CIMS Server.
- **Last Reporting Date.** The last reporting date that CIMS Web end users can view. For example, if the date is `December 31 2010`, end users cannot view reports for dates after December 2010. The default is `December 31 2199`.

  Note • CIMS Web administrators can view reports for any date.

3 When you are finished, click **Update Configuration** to change the settings.

Note • **Update Configuration also refreshes additional configuration options that are set in CIMS Server Administrator and stored in the Web server cache. For more information about the configuration options that you can set for CIMS Server Web Reporting, refer to the *CIMS Server Administrator's Guide*.**

About Updating Identifiers

A key feature of viewing invoices in CIMS Server Web Reporting is the ability to drill down on the units consumed for a resource by identifier. This feature uses the CIMSRateIdentifiers table, which contains the rate codes that are processed from the input resource file(s) and correlates them to their corresponding identifier names in the CIMSIdent table.

If the identifiers in and/or a rate code or codes in the input file have changed, the CIMSRateIdentifiers table will retain unused data in addition to the current data. Although this does not cause processing problems, the table can accumulate a large amount of data. You can click **Update Identifiers Cache** to update the table so that it contains only the current data; however, in most cases this step will already be completed by your CIMS Server administrator.

For more information about maintaining identifiers, refer to the ***CIMS Server Administrator's Guide*.**

Creating Custom Report and Transaction Parameters

The standard reports provided with CIMS Server use ASP.NET pages to provide report and transaction parameters. If needed, you can create custom parameters using either ASP.NET or parameter fields in Crystal Reports.

For assistance with creating custom report parameters, contact CIMS Lab.

Creating Parameters Using ASP.NET

To create parameters using ASP.NET, modify the `paramTemplate.ascx` and `paramTemplate.ascx.cs` parameter pages. If CIMS Server was installed in the default location, these pages are in `C:\Program Files\CIMSLab\Server\Web\CIMSReporting\CIMSParameters\CIMSComponents\Custom`.

When you modify the template parameter pages, the following must match:

- The parameter field name defined in the report.
- The file names of the parameter ASP.NET pages.
- The control name for the parameter within the ASP.NET pages.

For example, if the ASP.NET file names are `paramABC.ascx` and `paramABC.ascx.cs`, the parameter field name must be `ABC` (or `@ABC` if the parameter is not used in a stored procedure), and the control name must be `'ABC'` (for example, `SELECT NAME='ABC'`).

Creating Parameters Using Parameter Fields

You can also use parameter fields to create parameters within a report. To add parameter fields:

1. Open the report in Crystal Reports, and then click **Insert ▸ Field Object**.
2. Right-click **Parameter Fields**, and then click **New**.
3. In the **Create Parameter Field** dialog box, type the name of the field.
4. In the **Prompting text** box, type one of the following:
   - `LEN=` This creates a text box with the specified maximum character length on the report parameters page in CIMS Server Web Reporting. For example, `LEN=6` limits the maximum characters that can be typed in the box to six.
   - `YorN` This creates a Y/N select box on the report parameters page in CIMS Server Web Reporting.
5. In the **Value type** box, leave the value at **String** (the default).
6. Click **OK** to save the parameter field.

Note • You can set options in the Options area of the Create Parameter Field dialog box. However, these options are not used by CIMS Server Web Reporting. Refer to your Crystal Reports documentation for more information about these options.

Creating Custom Advanced Spreadsheets

Note • The information in this section is pertinent only if you want create custom CIMS Advanced Spreadsheets. For more information about CIMS Advanced Spreadsheets, refer to *Chapter 4, Running and Working With CIMS Advanced Spreadsheets*.

This section assumes that you have knowledge of XML and SQL concepts and conventions. If you are using an Oracle database, contact CIMS Lab for information about using CIMS Advanced Spreadsheets with Oracle.

Each advanced spreadsheet is defined by an XML file. CIMS Lab provides XML definition files for the standard spreadsheets described in *Standard Advanced Spreadsheet Descriptions* on page 4-14. If CIMS Server is installed in the default location, these files are in `C:\Program Files\CIMSLab\Server\AdvSpreadsheets\Standard`. To create custom advanced spreadsheets, you can modify the standard XML definition files or you can create new files.

Note • To use an advanced spreadsheet, you must move the spreadsheet XML file from the `AdvSpreadsheets` folder to the folder that contains your reports. For more more information, refer to the *CIMS Server Administrator's Guide*.

The section *About the XML Spreadsheet Definition File Structure* on page 5-13 defines the required structure for the advanced spreadsheet definition files. Whether you are modifying an existing file or creating a new file, you need to follow this structure.

About the XML Spreadsheet Definition File Structure

The XML definition file for each spreadsheet is composed of three parts:

- The name and description of the spreadsheet.
- The SQL stored procedure, view, or table used to retrieve data.
- The fields that appear in the spreadsheet.

The structure of each of these parts is shown in the following XML definition file for the crosstab spreadsheet, `SS_CRTAB.xml`.

Sample XML Definition

The spreadsheet name and description are defined here. For more information, see page 5-14.

The SQL stored procedure, view, or table is defined here. For more information, see page 5-15.

The spreadsheet fields are defined here. For more information, see page 5-17.

```
<?xml version="1.0" encoding="utf-8"?>
<SpreadSheet name="Crosstab Spreadsheet">
<!--Generic description for the report, retained for future UI implementation-->
<Description>Account Crosstab Spreadsheet</Description>


    <!--SQL Types...-->
    <SQL type="storedprocedure" name="CIMSSp_Summary" crosstab="1"
    crosstabdrilldown="1">
        <!--Param types...-->

        <Param name="AccountCodeStart" type="custom"/>
        <Param name="AccountCodeEnd" type="custom"/>
        <Param name="InvoiceLevel" type="custom" SQLIgnore="1"/>
        <Param name="AccountStart" type="custom"/>
        <Param name="AccountLength" type="custom"/>
        <Param name="DateRange" type="custom" SQLIgnore="1"/>
        <Param name="DateStart" type="custom"/>
        <Param name="DateEnd" type="custom"/>
        <Param name="UserID" type="system"/>
        <Param name="SubtotalLength" type="constant">2</Param>

    </SQL>

    <Fields>
        <!--These are the fields that will be displayed in the report...-->
        <Field name="RateCode" xaxislevel="1">Rate Code</Field>
        <Field name="AccountName" yaxislevel="1">Account Name</Field>
        <Field name="MoneyValue" xaxislevel="2" >Money Value</Field>
        <Field name="AccountCode" drilldown="1" secondaryDrill="1" criteria="1">
         Account Code</Field>
        <Field name="Shift" drilldown="1">Shift</Field>
        <Field name="RateIndex" function="max">Rate Index</Field>
        <Field name="Description" selectable="1">Description</Field>
        <Field name="Comments" drilldown="1">Comments</Field>
        <Field name="RateGroup" selectable="1" sort="1">Rate Group</Field>
        <Field name="ResourceUnits" sum="1" >Resource Units</Field>
        <Field name="GroupTitleLong" >Rate Group Title</Field>

    </Fields>
</SpreadSheet>
```

Defining the Name and Description of the Spreadsheet

The spreadsheet name is an attribute of the root `SpreadSheet` element and is defined as follows:

```
<SpreadSheet name="Name{string}">
```

Note • The spreadsheet name that is defined here is the name that appears on the Spreadsheets page. For example, if you define the spreadsheet name as `<SpreadSheet name="Invoice Spreadsheet">`, the name Invoice Spreadsheet appears on the Spreadsheet page.

The spreadsheet description is defined in the `Description` element. This element cannot have attributes and is defined as follows.

```
<Description>Description{string}</Description>
```

The `Description` element is usually the first child of the `SpreadSheet` element.

Defining the SQL Stored Procedure, View, or Table

The SQL stored procedure, view, or table that is used to retrieve the data for the spreadsheet is defined as an attribute of the SQL element. The SQL element is a child of the root SpreadSheet element and is defined as follows:

```
<SQL type="storedprocedure | view | table" name="SQL Object Name{string}" crosstab="1"
crosstabdrilldown="1">
```

SQL Element Attributes

The attributes of the SQL element are defined as follows.

Attribute	Description
type="storedprocedure | view | table"	The type of SQL object that is used to retrieve data. If the type is a view or table, then a select statement is built and executed on the specified view or table name. If the type is a stored procedure, then the stored procedure is executed with parameters passed in (see *Param Element Attributes* on page 5-16).
name="SQL Object Name{string}"	The name of the SQL object in the database.
crosstab="1"	If this attribute is present, the spreadsheet is a crosstab spreadsheet. You must define four or more fields for a crosstab spreadsheet (see *Defining the Fields That Appear in the Spreadsheet* on page 5-17). Otherwise, the CIMS Crosstab Wizard does not appear on the parameters page for the spreadsheet.
crosstabdrilldown="1"	If this attribute is present, the crosstab spreadsheet includes drill down on the values in the main content area of the spreadsheet (see *Running a Crosstab Advanced Spreadsheet* on page 4-6). If the crosstab attribute is not present, this attribute is ignored.

Table 5-1 • SQL Element Attributes

Param Element Attributes

If the `type` attribute is a view or table, then input parameters are not used. A simple select statement is generated based on the specified table or view name.

If the `type` attribute is a stored procedure, then `Param` elements are used to define the input parameters for the store procedure. The `Param` elements are child elements of the `SQL` element. `Param` elements are defined as follows:

```
<Param name="Name{string}" type="custom | system | constant" SQLIgnore="1"/>
```

The attributes of the `Param` element are defined as follows.

Attribute	Description
`name="Name{string}"`	The parameter names must match the names of the parameter defined in the stored procedure.
`type="custom | system | constant"`	The type attribute has three allowable string values: ■ `custom` This type specifies that an external Web control should be loaded to provide user input for this parameter. For example, to select the start and end dates for a spreadsheet. ■ `system` This type specifies that the value for the parameter should be pulled from system internal data such as a user or group ID. ■ `constant` This type may be used if you want to pass a constant as a parameter. In this case, the text entered for the `Param` element will be passed to the stored procedure.
`SQLIgnore="1"`	If this attribute is present, the parameter is not passed to the stored procedure. This attribute enables you to load custom controls.

Table 5-2 • Param Element Attributes

Defining the Fields That Appear in the Spreadsheet

The `Fields` element defines the fields that appear in the spreadsheet. The `Fields` element is a child of the root `SpreadSheet` element and has child `Field` elements. The `Fields` and `Field` elements are defined as follows:

```
<Fields runtotal="1">
         <Field name="Column Name{string}" sort="1" selectable="1" criteria="1"
         groupby="1" drilldown="1" format="string" sum="1" function="Function
         Name{string}" xaxislevel="1|2" yaxislevel="1">Display Name{string}</Field>
</Fields>
```

Note • `Display Name {string}` = **the field name**.

Fields Element Attributes

The `Fields` element has a single attribute, `runtotal="1"`. If this attribute is present, a Run Total row appears at the bottom of the spreadsheet. If the `Field` attribute `groupby` is not present, `runtotal` is ignored.

Field Element Attributes

The attributes of the `Field` elements are defined as follows:

Attribute	Description
`name="Column Name{string}"`	The name of the field as it is returned from the database.
`sort="1"`	If this attribute is present, users can select whether the spreadsheet rows are sorted by the values in this field.
`selectable="1"`	If this attribute is present, users can show or hide this field in the spreadsheet.
`criteria="1"`	If this attribute is present, users can apply a condition for data displayed in the spreadsheet. These conditions are based on the data value being equal to, greater than, or less than the value specified by the user.
`groupby="1"`	If this attribute is present, users can drill down on values in the field to view detailed data.
`drilldown="1"`	If this attribute is present, the field appears only when users drill down on data in the spreadsheet. This enables you to display more relevant data in the detail view while hiding the detail when viewing summary data. If the `groupby` attribute is not present, this attribute is ignored.

Figure 5-3 • Field Element Attributes

Attribute	Description
`format="string"`	This attribute specifies the format for the field. The formatting model follows that of the Microsoft .NET Framework. All numbers are formatted using the Number format by default. Additional internationalization will be automatically applied to the formatting. The format characters are: c, C Currency format d, D Decimal format e, E Scientific (exponential) format f, F Fixed-point format g, G General format n, N Number format x, X Hexadecimal format
`sum="1"`	If this attribute is present, the values in the field are summed based on the `groupby` attribute. If the `groupby` attribute is not present, this attribute is ignored. If the `criteria` attribute is present, only those values that meet the condition set by the `criteria` attribute will be summed and included in this field.
`function="Function Name{string}"`	This attribute applies aggregate functions to columns in the spreadsheet. The following aggregates are supported: Sum (Sum) Avg (Average) Min (Minimum) Max (Maximum) Count (Count) StDev (Statistical standard deviation) Var (Statistical variance) If the `groupby` attribute is not present, this attribute is ignored. Functions applied to crosstab spreadsheets can be overridden by the end user using the CIMS Crosstab Wizard (see *Running a Crosstab Advanced Spreadsheet* on page 4-6). Note that all functions applied to fields are also reflected in the Run Total row.

Figure 5-3 • Field Element Attributes (Continued)

Attribute	Description
`xaxislevel="1|2"`	This attribute is used only for crosstab spreadsheets. This attribute may have a value of `"1"` or `"2"`. The value `"1"` specifies that the values for this field will occupy the first row of the spreadsheet. The value `"2"` specifies that the field will contain the content of the spreadsheet. If the `criteria` attribute is present, only those values that meet the condition set by the `criteria` attribute will be summed and included in this field. The values for this attribute can be overridden by the end user using the CIMS Crosstab Wizard (see *Running a Crosstab Advanced Spreadsheet* on page 4-6).
`yaxislevel="1"`	This attribute is used only for crosstab spreadsheets. This attribute specifies that the field will occupy the first column of the spreadsheet. This attribute can be overridden by the end user using the CIMS Crosstab Wizard (see *Running a Crosstab Advanced Spreadsheet* on page 4-6).

Figure 5-3 • Field Element Attributes (Continued)

6

Using Transactions

This chapter describes how to create miscellaneous, recurring, and credit transactions.

Working With Transactions **6-2**
Adding Transactions 6-3
Editing Transactions 6-4
Deleting Transactions 6-4
Navigating Transactions 6-4

Working With Transactions

The primary method for input into the CIMS Server Resource (CSR) file. This file provides usage data from any IT source in a common format. CSR files are generated from usage metering files produced by systems in your organization, for example, IIS log files, SQL Server trace files, or disk usage output files.

In some circumstances, you might want to generate a CSR file for occurrences that are not contained in a usage metering file. For example, you might want to generate a CSR file to apply a credit for an overcharge or to charge for a one time occurrence such as the cost of providing a computer to a new employee. In these cases, you can create a transaction that contains the chargeback information that you want to include in the CSR file.

In summary, a transaction enables you to generate charges or credits for any item or resource that is not contained in a usage metering file.

There are three types of transactions:

- **Miscellaneous Transactions.** These are transactions that occur on a one-time basis. For example, charging for the services of a consultant who worked on a project for two days.
- **Recurring Transactions.** These are transactions that re-occur over a period of time. For example, charging for a set number of computers that are delivered to a department each quarter.
- **Credit Transactions.** These are transactions that apply a credit for resources units consumed or monetary charges.

To process transactions, you need to use the CIMS Data Collector for Transactions. For more information about this collector, refer to the *CIMS Data Collectors for Microsoft Windows Installation and User Guide*.

Adding Transactions

To add transactions:

1. Click **Admin** ▸ **Transactions** ▸ **Miscellaneous/Recurring/Credit**. Note that Miscellaneous, Recurring, and Credit are separate commands.
2. On the transaction list page, click **Add**.
3. On the add transaction page, enter the following parameters for the transaction:

   - **Account Code or account code levels.** Depending on the configuration set by your CIMS Server administrator for your user group, the first setting that appears on the page will be either **Account Code**, in which you can enter an overall account code, *or* account code level boxes, in which you can enter levels of the account code. For more information about configuring this setting, refer to the *CIMS Server Administrator's Guide*.
   - **Rate Code.** The rate code for the transaction.
   - **Shift Code (optional).** The shift code for the transaction. Shift codes are set by your CIMS Server administrator. For more information, refer to the *CIMS Server Administrator's Guide*.
   - **Amount**. The amount of the transaction. Usually this figure is in resource units, for example, 500 computers, but it can also be monetary. If monetary, you can type this amount with our without the decimal point. For example, 1000 or 1000.00. Credit amounts need to be specified by a minus sign (e.g., `-1000`).
   - **From/To Date (Miscellaneous and Credit Transactions only).** The date range that the transaction occurred.
   - **Frequency (Recurring Transactions only).** The frequency that the transaction should occur (that is, every month, every 6 months, every quarter, etc.). Frequency is based on the calendar year (January–December).
   - **Enter transaction on (Recurring Transactions only).** The period in which the transaction should be processed. The number of periods correlates to the value in the **Frequency** select box. For example, if **Every 6 months** is selected for frequency, six periods appear (Period 1 represents January and July, Period 2 represents February and August, etc.)

     Note that the date parameter used by the Transactions collector determines which recurring transactions are processed. For example, if the collector is run in June with a date parameter of `Current`, and the transaction is set to **Once a year** and **Period 1** (January), the transaction will not be processed.
   - **Begin/End Processing on (Recurring Transactions only, optional).** The date range in which you want recurring transactions to be processed. CIMS Server will not process recurring transactions before or after these dates. The default is the first day of the current month to December 31, 2199.
   - **Notes**. Any relevant comments.

4. When you are finished, click **Add** to save the transaction and return the transaction list page. If you do not want to save the transaction click **Return**.

Editing Transactions

To edit miscellaneous and credit transactions:

1. On the transaction list page, click the date for the transaction(s) that you want to edit in the **Set the Date Range** or **From/To** select boxes.
2. Click **Refresh**. All transactions within the specified date range appear.
3. Click the **Edit** button for the transaction that you want. to edit. For a description of the settings that you can edit, see *Adding Transactions* on page 6-3.
4. When you have completed the edits, click **Update** to save the edits and return to the transaction list page. If you do not want to save the edits, click **Return**.

To edit recurring transactions:

1. Click **Edit** for the transaction that you want. For a description of the settings that you can edit, see *Adding Transactions* on page 6-3.
2. When you have completed the edits, click **Update** to save the edits and return to the transaction list page. If you do not want to save the edits click **Return**.

Deleting Transactions

To delete transactions:

On the transaction list page, click the **Delete** button for the transaction that you want to delete. You can also delete the transaction from the edit transaction page. In this case, the delete transaction page opens indicating the date and time that the transaction was deleted.

Navigating Transactions

You can navigate to the transaction pages by:

- Clicking **Admin ▸ Transactions**.

  Or

- Within an open transaction list page, clicking another transaction type in the **Select Type** select box.

7

Troubleshooting

This chapter describes problems you may encounter while using CIMS Server Web Reporting and how to solve them. If you cannot find the answer to your question here, please contact CIMS Lab (see *Contacting Technical Support* on page 7-5).

Connection Problems **7-2**

Unable to connect to the CIMS Server Web Reporting Web site 7-2

The CIMS Server Web Reporting Web site is not opening properly 7-2

Log On Problems **7-2**

System will not accept user ID or password 7-2

Reporting Problems **7-3**

Error message appears when trying to run a spreadsheet or publish a report 7-3

Reports take a long time to generate 7-3

Problems viewing reports 7-3

Old data appears in reports 7-3

Cannot drill down in reports 7-4

Error message appears when running reports 7-4

Reports are missing from reports lists 7-4

General Problems **7-4**

Web reporting session is timing out before or after session timeout value 7-4

Computer locks up or runs slowly 7-4

Contacting Technical Support **7-5**

Connection Problems

Unable to connect to the CIMS Server Web Reporting Web site

Verify the following:

- Your Internet or network connection is working properly.
- You have appropriate network permissions and are using Internet Explorer 5.5 or later.
- You entered the correct URL.
- You have the required security permissions for the CIMS Server program folders discussed in *Assigning CIMS Server Folder Security Permissions* on page 1-7.

For assistance troubleshooting these problems, contact your system administrator.

The CIMS Server Web Reporting Web site is not opening properly

Try the following:

- Restart IIS by clicking **Start** ▸ **Run**, type `iisreset /restart`, and then click **OK**.
- Check the IIS security settings (refer to the *CIMS Server Administrator's Guide* for more information)
- If you are using Crystal Reports 8.5, make sure that you have applied the Crystal patch `Crystal Decisions ActiveX Viewer Patch.exe` and any other patches recommended by CIMS Lab. If you are using Crystal Reports 9, make sure that you have installed Service Pack 2. Crystal Reports patches and services packs are available on the CIMS Lab FTP site (ftp://ftp.cimslab.com) and CIMS Product CD. The path on both the FTP site and CIMS Product CD is `CIMSServer\CrystalPatches`.
- Install the latest service pack for Microsoft SQL Server.

Log On Problems

System will not accept user ID or password

Make sure that you are typing the correct user ID and password. Note that the user password is case-sensitive.

If the password is invalid, another possible cause is that your CIMS Server administrator did not click **Change** when he added your password in the User Maintenance dialog box in CIMS Server Administrator. The administrator must click **Change** to save the password regardless of whether he is adding the password for the first time or is changing the password. For more information about setting the user ID and password, refer to the *CIMS Server Administrator's Guide*.

Reporting Problems

Error message appears when trying to run a spreadsheet or publish a report

If you receive the following messages when you try to run a spreadsheet or publish a report, you do not have the correct security permissions for the CIMS Server program folders discussed in *Assigning CIMS Server Folder Security Permissions* on page 1-7. Contact your CIMS Server administrator or system administrator.

Spreadsheet Message

```
Your Web Userid does not have sufficient access rights to create spreadsheets. Please
have the CIMS Web Administrator enable write permissions for the IIS Web User to the
..\CIMSLab\Server\Web folder on the CIMS Server. Consult the CIMS Server Administrator's
Guide for more information.
```

Published Report Message

```
Your Web Userid does not have sufficient access rights to create published reports. Please
have the CIMS Web Administrator enable write permissions for the IIS Web User to the
..\CIMSLab\Server\Reports\Published folder on the CIMS Server. Consult the CIMS Server
Administrator's Guide for more information.
```

Reports take a long time to generate

Make sure that your Internet or network connection is working properly. It could be that excessive network usage is slowing down either the connection or the server. If you are using the ActiveX viewer and would like to stop a report that has begun loading, click the Stop Loading button (see *Stopping a Report from Loading (ActiveX Viewer Only)* on page 3-4).

If you or other users would like to view the same report again, you can avoid waiting for the report to generate by publishing or saving the report. For more information, see *Publishing Reports* on page 2-12 or *Saving Reports* on page 3-8.

Problems viewing reports

Change the viewer used to view reports. For more information, see *Choosing a Crystal Report Viewer* on page 5-6.

If you are using the Crystal Report ActiveX viewer and report headers and data do not appear in the report, you may need to use the HTML or Java viewer instead. You may not have administrative privileges to allow the ActiveX viewer to be automatically downloaded and installed on the computer on which your are trying to run the report.

Old data appears in reports

One or more old loads have not been removed from the database. Unload the old data. For more information, refer to the *CIMS Server Administrator's Guide*.

Cannot drill down in reports

Certain items do not have any additional information available. If you place the cursor on an item and the cursor icon becomes a magnifying glass or a hand, you can drill down. If it does not, there is no detailed information available about the item.

If you cannot drill down on items that should have drill down capability, install the ActiveX patch from Crystal. CIMS Lab provides this patch on the CIMS Lab FTP site and the product CD (`...\CIMSServer\CrystalPatches\Crystal Decisions ActiveX Viewer Patch.exe`).

Error message appears when running reports

If one of the following error messages appears when running a report:

- A time-out message that appears immediately.
- `-2147192179 An error has occurred on the server in attempting to access the data source.`

Click **Administration** ▸ **Database** ▸ **Database Object Manager** in CIMS Server Administrator and add any database objects that do not exist in the database (that is, **No** appears in the **Exists** column for an object or objects). If this does not solve the problem, drop all objects and then create them again. For more information about database objects, refer to the *CIMS Server Administrator's Guide*.

To view a more detail error message, run the report directly from Crystal Reports (not from the Web browser).

Reports are missing from reports lists

If reports that you used to be able to access are missing from reports lists, your CIMS Server administrator may have removed access to those reports from you user group. Contact your CIMS Server administrator.

General Problems

Web reporting session is timing out before or after session timeout value

If you change the **Session Timeout Minutes** value, the change will not take effect until you restart IIS. For instructions on how to restart IIS, see page 7-2.

Computer locks up or runs slowly

The computer might not have enough memory to process. Try running the application on a PC with more memory (preferably 256 MB or more).

Contacting Technical Support

The CIMS Lab Technical Support department is here to answer your questions on any aspect of CIMS Lab products.

CIMS Lab technical support can be reached in the following ways:

- **Telephone**: (800) 283-4267 in USA and Canada; 916-783-8525 International
- **E-mail**: support@cimslab.com
- **Fax request**: (916) 783-2090

International customers may contact one of our authorized international partners. Contact CIMS Lab for more information.

In addition, customers may visit the Customer Area on our Web site for product downloads, updates, technical documentation, and password information. We are on the Web at http://www.cimslab.com.

A

Standard Reports

This appendix describes the standard reports provided with CIMS Server.

About CIMS Server Reports A-4
Report Naming Conventions A-5

Conventions Used in This Appendix A-5

Reports by File Name A-6

Graphs A-8
Cost Trend—Accounts Graph A-8
Cost Trend—Rates Graph A-9
Resource Trend Graph A-10

Drill Down Reports A-11
Invoice Drill Down for Rate Group Report A-11
Invoice Drill Down for Rate Group by Date Report A-13
Invoice Drill Down for Units Report A-14
Invoice Drill Down for Units by Date Report A-16
Multilevel Drill Down for Units Report A-17

Reports A-19
Client Audit Report A-19
Rate Audit Report A-21
Transaction Audit Report A-23
Batch Report A-24
Account Budget for Period and YTD Report A-25
Line Item Budget for Period and YTD Report A-26
Configuration Report A-27
CICS Transaction Report A-28
Client Report A-29
Account Summary Daily Report A-30
Account Summary Daily 2 Report A-31
DB2 Summary Report A-32

Detail by Rate Group Report A-33
Detail by Rate Group/Identifier Report A-34
Detail Rate Codes by Identifiers A-35
Detail Rate Codes by Identifiers/Account A-36
MS Exchange 2000 Resource Report A-37
Invoice by Account Level V2 Report A-38
Alternate Invoice Report A-38
Account Total Invoice Report A-40
Invoice with Budget Report A-41
Invoice Report A-43
Invoice by Account Level Report (SQL Server Reporting Services) A-45
Invoice by Account Level Report (Crystal Reports) A-47
Invoice with Shifts Report A-49
Run Total Invoice Report A-51
Run Total Percent Report A-52
Run Total Rate Group Percent Report A-53
Run Total Invoice with Shifts A-54
Zero Cost Center Invoice Report A-55
Zero Cost Center Factor Report A-57
Job Cost Report A-58
MS SQL Server 2000 Resource Report A-60
Percentage Report A-61
Rate Report A-62
Top Cost Report A-63
Top 10 Bar Graph Report A-65
Top 10 Pie Chart Report A-67
Top Accounts for Rate Report A-69
Cost Trend Report A-70
Cost Trend by Rate Report A-71
Resource Usage Trend Report A-72
Transaction Report A-73
Cost Variance Report A-74
Cost Variance Drill Down Report A-75
Resource Variance Report A-76
Disk Directory Resource Report A-77
Account Summary by Week Report A-78
Account Summary by Week—Wide Report A-79
Account Summary YTD Report A-80
Account Summary YTD—Wide Report A-81

Spreadsheets **A-82**
Invoice Spreadsheet A-82
Run Total Invoice Spreadsheet A-83
Invoice by Rate Group Spreadsheet A-84
Invoice by Account Code Spreadsheet A-85
Proration by Total Amount Spreadsheet A-86
Proration by Rate Code Spreadsheet A-87
Proration by Rate Group Spreadsheet A-88
Top 10 Accounts for Rate Spreadsheet A-89
Account Summary Week Spreadsheet A-90
Account Summary YTD Spreadsheet A-91
Account Summary YTD by Rate Spreadsheet A-92
Account Summary YTD Cost by Rate Group Spreadsheet A-93

Crosstab Reports **A-94**
Daily Crosstab—Charges A-94
Daily Crosstab—Usage A-95
Detail by Identifier Crosstab A-96
Detail by Identifier by Date Crosstab A-97
Monthly Crosstab—Charges A-98
Monthly Crosstab—Usage A-99
Summary Crosstab—Charges A-100
Summary by Rate Group Crosstab—Charges A-101
Summary Crosstab—Usage A-102
Summary by Rate Group Crosstab—Usage A-103
Weekly Crosstab—Charges A-104
Weekly Crosstab—Usage A-105

Templates **A-106**
Report Both Template A-106
Report Cost Template A-108
Report Resource Template A-109
Spreadsheet Both Template A-109
Spreadsheets Cost Template A-111
Spreadsheets Resource Template A-112

About CIMS Server Reports

CIMS Server produces chargeback and resource accounting reports based on IT usage data from your organization. To help you to easily create reports that display the information that you need, CIMS Server includes a variety of standard reports that you can use as templates. This appendix provides a description of each standard report with the exception of CIMS Advanced Spreadsheets, which are described in *Standard Advanced Spreadsheet Descriptions* on page 4-14.

Location of CIMS Server Reports

If you installed CIMS Server in the default location, reports are located in the following folders. Each of these folders includes a `Standard`, `Custom`, and `Published` subfolder to store standard, custom, and published reports as described in *Introduction to Report Types* on page 2-2.

Crystal Reports

The Crystal reports are grouped by the Crystal version in the following locations. Note that each location contains the same reports. Only the Crystal version is different.

- `C:\Program Files\CIMSLab\Server\Reports` (contains Crystal 8.5 reports)
- `...\Reports90` (contains Crystal 9 reports)
- `...\Reports10` (contains Crystal 10 reports)

SQL Server Reporting Services Reports

`C:\Program Files\CIMSLab\Server\MSRptServReports`

CIMS Advanced Spreadsheets

`C:\Program Files\CIMSLab\Server\AdvSpreadsheets`

Storing All Reports in the Same Folder

You need to use one `Standard`, `Custom`, and `Published` folder for all report types. For example, if you want to use custom reports for Crystal Reports 9, SQL Server Reporting Services, and CIMS Advanced Spreadsheets, you can place all the report files in the `Reports90\Custom` folder. The path to the `Reports90\Custom` folder must be defined in the **Path to Custom Reports Folder** box on the Edit Configuration page (see *Configuring System-Wide Settings* on page 5-8).

Report Naming Conventions

The following is the file naming convention for the CIMS Server standard reports for Crystal Reports and SQL Server Reporting Services:

Character 1	The type of report: (G)raph, (I)Drill down, (R)eport, (S)preadsheet, (X)Crosstab
Character 2,3,4	Description of report (if template, `TMP`)
Character 5	Function of report: (R)esource, (C)ost, (B)oth, (U)ser, (X)Other **Note:** With the exception of the Job Cost Report, all cost (C) reports reflect data in the CIMSSummary table.
Character 6,7,8	Numbering sequence for reports of the same type (for example, invoice, budget, trend)

For example, the file name `RBGTC001.rpt` represents the following:

`R` = Report

`BGT` = Budget

`C` = Cost

`001` = Report number

Conventions Used in This Appendix

The reports listed in this appendix are grouped by type (graphs, drill down reports, reports, spreadsheets, crosstab reports, and templates) and are presented in alphabetical order by file name.

Each report includes a description with the following information:

File name. The name of the report file.

Stored Procedure. The stored procedure used for the report (if applicable). A stored procedure is a set of SQL statements that can perform both queries and actions that allow the system to generate reports.

Drill down. The drill down features for the report (if applicable).

Parameters. The parameters for the report such as starting and ending account codes, account code level, and from and to dates. For a description of these parameters, see *Using Report Parameters* on page 2-4.

Reports by File Name

For easy reference, the following lists each standard report by file name and provides the page number where you can find the report description. Reports that begin with RTMP or STMP are report templates, which are in the . . .Standard/Templates folder.

GTRDC001.rpt page A-8

GTRDC002.rpt page A-9

GTRDR001.rpt page A-10

IINXC001.rdl page A-11

IINXC001.rpt page A-11

IINXC002.rdl page A-13

IINXC002.rpt page A-13

IINXC004.rpt page A-14

IINXC005.rpt page A-16

IINXC006.rdl page A-17

IINXC006.rpt page A-17

RACLX001.rpt page A-19

RARTX001.rpt page A-21

RATRX001.rpt page A-23

RBATR001.rpt page A-24

RBGTC001.rpt page A-25

RBGTC002.rpt page A-26

RCFGX001.rpt page A-27

RCICR001.rpt page A-28

RCLTX001.rpt page A-29

RDAYC001.rpt page A-30

RDAYC002.rpt page A-31

RDB2R001.rpt page A-32

RDETR001.rpt page A-33

RDETR002.rpt page A-34

RDRIR001.rpt page A-35

RDRIR002.rpt page A-36

REX2R001.rpt page A-37

RINVC001.rpt page A-38

RINVC002.rpt page A-38

RINVC003.rpt page A-40

RINVC004.rpt page A-41

RINVC006.rpt page A-43

RINVC007.rdl page A-45

RINVC007.rpt page A-47

RINVC009.rpt page A-49

RIVTC001.rpt page A-51

RIVTC002.rpt page A-52

RIVTC003.rpt page A-53
RIVTC004.rpt page A-54
RIVZC001.rpt page A-55
RIVZC002.rpt page A-57
RJOBC001.rpt page A-58
RMS2R001.rpt page A-60
RPERX001.rpt page A-61
RRATX001.rpt page A-62
RTMPB001.rpt page A-106
RTMPC001.rpt page A-108
RTMPR001.rpt page A-109
RTOPC001.rpt page A-63
RTOPC002.rpt page A-65
RTOPC003.rpt page A-67
RTOPC004.rpt page A-69
RTRDC001.rpt page A-70
RTRDC002.rpt page A-71
RTRDR001.rpt page A-72
RTRNX001.rpt page A-73
RVARC001.rpt page A-74
RVARC002.rpt page A-75
RVARR001.rpt page A-76
RWDKR001.rpt page A-77
RWEKC001.rpt page A-78
RWEKC002.rpt page A-79
RYTDC001.rpt page A-80
RYTDC002.rpt page A-81
SINVC001.rpt page A-82
SINVC002.rpt page A-83
SINVC003.rpt page A-84
SINVC004.rpt page A-85
SPERX001.rpt page A-86
SPERX002.rpt page A-87
SPERX003.rpt page A-88
STMPB001.rpt page A-109
STMPC001.rpt page A-111
STMPR001.rpt page A-112
STOPC004.rpt page A-89
SWEKC001.rpt page A-90
SYTDC001.rpt page A-91
SYTDC002.rpt page A-92
SYTDC003.rpt page A-93
XDAYC001.rpt page A-94
XDAYR001.rpt page A-95
XDETR001.rpt page A-96
XDETR002.rpt page A-97
XMONC001.rpt page A-98
XMONR001.rpt page A-99
XSUMC001.rpt page A-100
XSUMC002.rpt page A-101
XSUMR001.rpt page A-102
XSUMR002.rpt page A-103
XWEKC001.rpt page A-104
XWEKR001.rpt page A-105

Graphs

Cost Trend–Accounts Graph

File name: GTRDC001.rpt

Stored Procedure: CIMSSP_Summary_Month

This graph report provides the total charges for all account codes for each month for the parameters selected followed by charges for individual account codes for each month.

Drill down: None

Parameters:

- Report Year
- Account Code Level
- Starting and Ending Account Code

Report Example

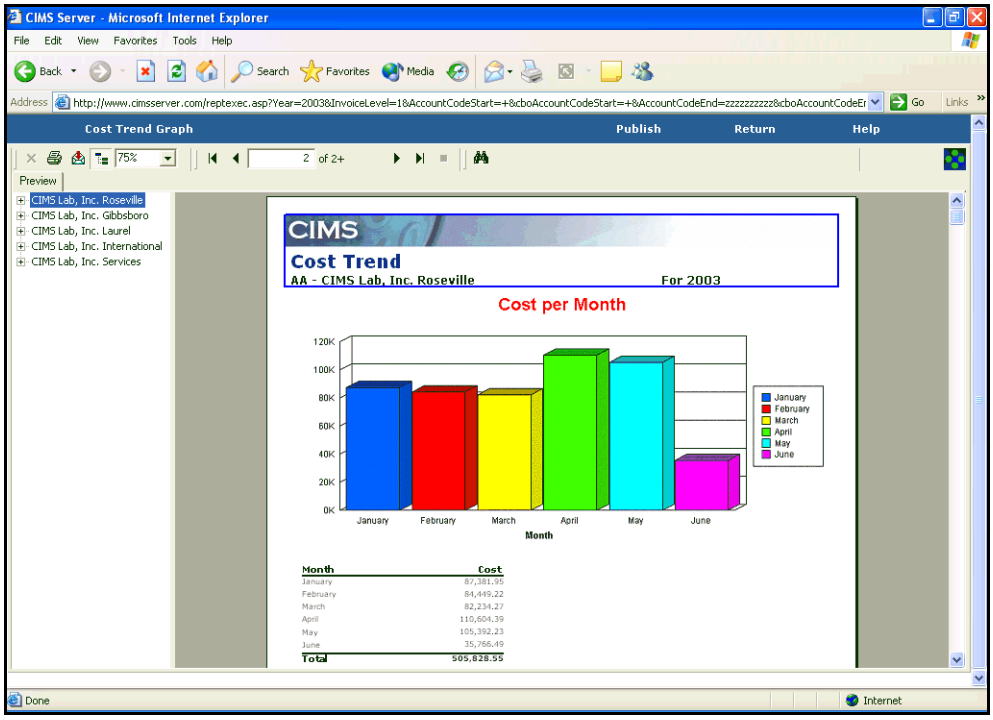


Figure A-1 • Cost Trend–Accounts Graph Example

Cost Trend–Rates Graph

File name: GTRDC002.rpt

Stored Procedure: CIMSSP_Summary_Month

This graph report provides the total charges for all rate codes for each month for the parameters selected followed by charges for individual rate codes for each month.

Drill down: None

Parameters:

- Report Year
- Starting and Ending Account Code

Report Example

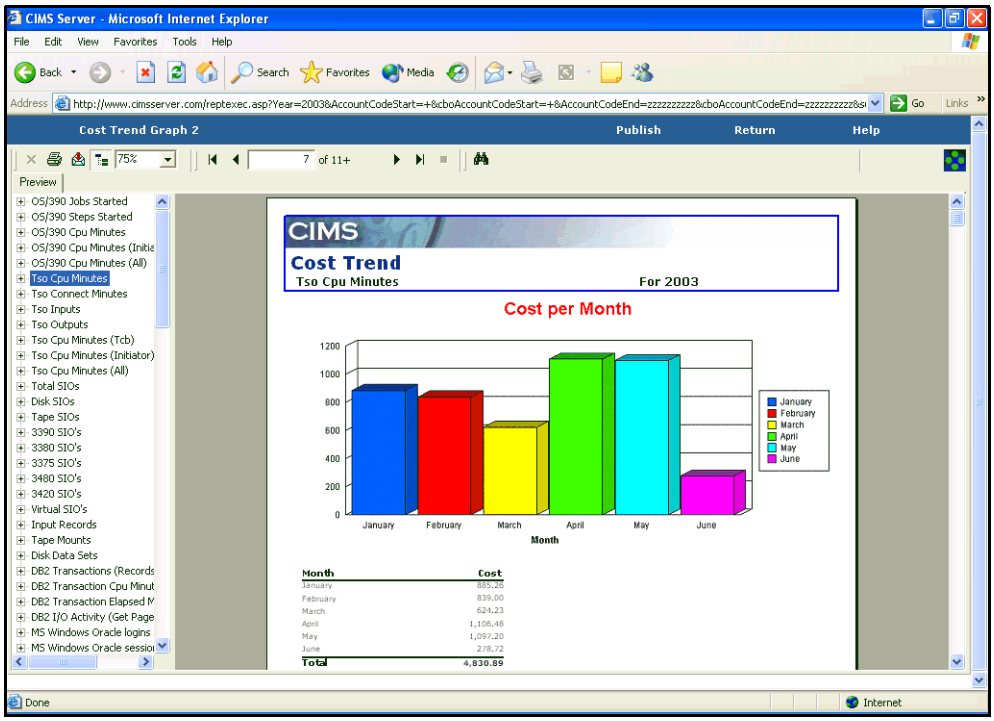


Figure A-2 • Cost Trend–Rates Graph Example

Resource Trend Graph

File name: GTRDR001.rpt

Stored Procedure: CIMSSP_Summary_Month

This graph report provides the total resource usage for all rate codes for each month for the parameters selected followed by resource usage for individual rate codes for each month.

Drill down: None

Parameters:

- Report Year
- Starting and Ending Account Code

Report Example

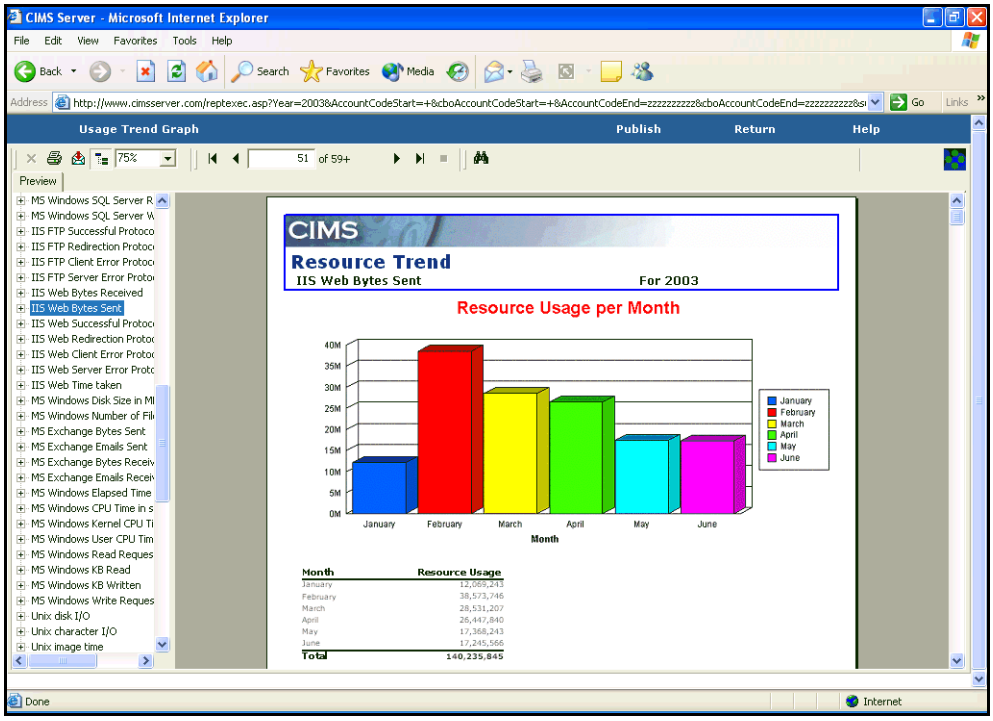


Figure A-3 • Resource Trend Graph Example

Drill Down Reports

Drill down reports enable you to view a breakdown of an item in a report, for example resource units or charges, by an identifier or identifiers. Drill down reports are invoked from other reports and cannot be run independently.

Invoice Drill Down for Rate Group Report

File name: `IINXC001.rdl` (SQL Server Reporting Services)

`IINXC001.rpt` (Crystal Reports)

Stored Procedure: `CIMSSP_Drilldown_by_RateGroup`

This report enables drill down of the charges for a rate group by identifier name. For example, the report in Figure A-4 on page A-12 provides a drill down of a rate group for charges associated with the identifier name `Jobname`. Charges for each rate code within the rate group are broken down by the identifier values for `Jobname`.

This report invokes from the following reports.

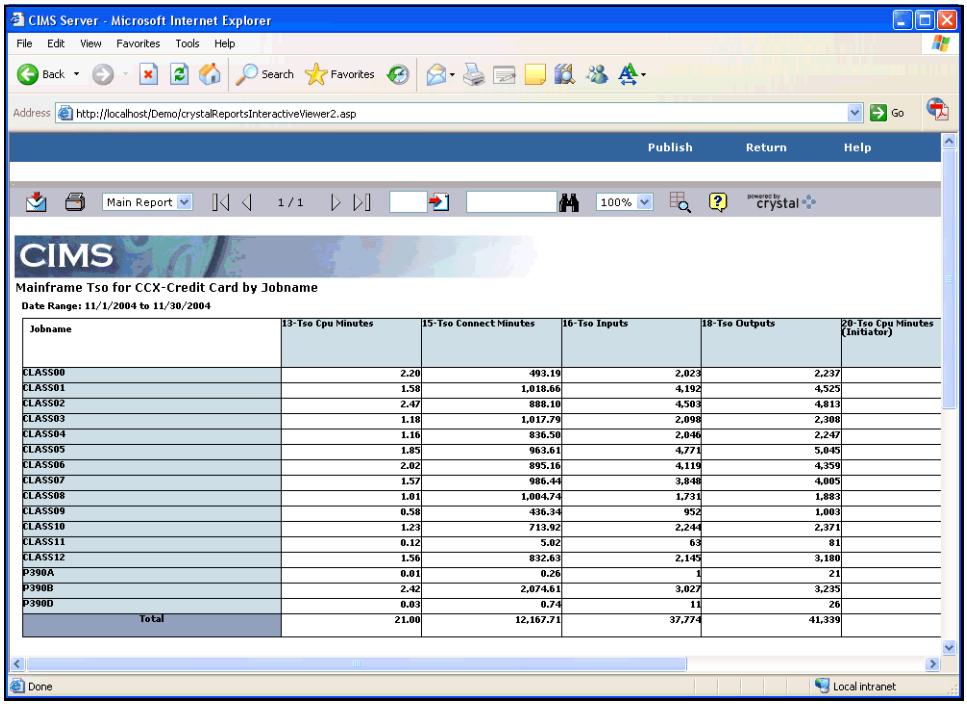
- Invoice with Budgets (see page A-41)
- Invoice (see page A-43)
- Invoice by Account Level for Reporting Services (see page A-45)
- Invoice by Account Level or Invoice by Account Level V2 for Crystal Reports (see page A-47)
- Invoice with Shifts (see page A-49)
- Zero Cost Center Invoice (see page A-55)

Drill down: None

Parameters:

- Identifier name
- All other parameters are supplied by the invoice report

Report Example



Jobname	13-Tso Cpu Minutes	15-Tso Connect Minutes	16-Tso Inputs	18-Tso Outputs	20-Tso Cpu Minutes (Initiator)
CLASS00	2.20	493.19	2,023	2,237	
CLASS01	1.58	1,018.66	4,192	4,525	
CLASS02	2.47	888.10	4,503	4,813	
CLASS03	1.18	1,017.79	2,098	2,308	
CLASS04	1.16	836.50	2,046	2,247	
CLASS05	1.85	963.61	4,771	5,045	
CLASS06	2.02	895.16	4,119	4,359	
CLASS07	1.57	986.44	3,848	4,005	
CLASS08	1.01	1,004.74	1,731	1,883	
CLASS09	0.58	436.34	952	1,003	
CLASS10	1.23	713.92	2,244	2,371	
CLASS11	0.12	5.02	63	81	
CLASS12	1.56	832.63	2,145	3,180	
P390A	0.01	0.26	1	21	
P390B	2.42	2,074.61	3,027	3,235	
P390D	0.03	0.74	11	26	
Total	21.00	12,167.71	37,774	41,339	

Figure A-4 • Invoice Drill Down for Rate Group Report Example

Invoice Drill Down for Rate Group by Date Report

File name: `IINXCO02.rdl` (SQL Server Reporting Services)

`IINXCO02.rpt` (Crystal Reports)

Stored Procedure: `CIMSSP_Drilldown_by_RateGroup_Date`

This report is similar to the Invoice Drill Down for Rate Group report (see page A-11). However, it also provides a breakdown of the data by date.

Drill down: None

Parameters:

- Identifier name
- All other parameters are supplied by the invoice report

Report Example

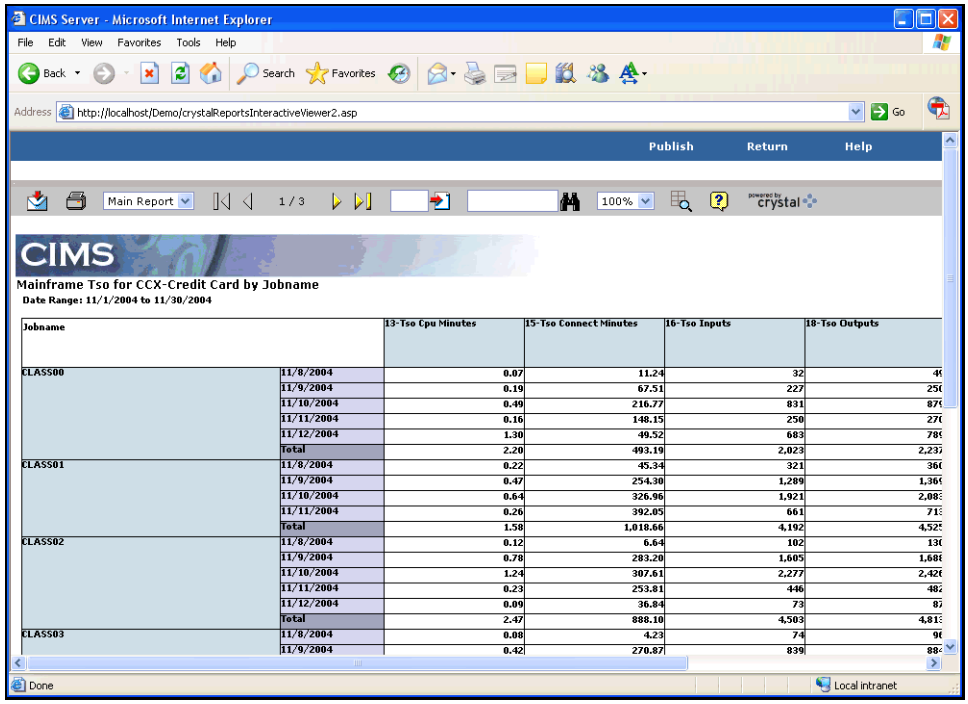


Figure A-5 • Invoice Drill Down for Rate Group by Date Report Example

Invoice Drill Down for Units Report

File name: IINXC004.rpt

Stored Procedure: CIMSSP_Drilldown_by_Rate

This report enables drill down of resource units by identifier name. For example, the report in Figure A-6 on page A-15 provides a drill down of resource units for the units associated with the identifier name Jobname. Units are broken down by the identifier values for Jobname.

This report invokes from the following reports.

- Alternate Invoice (see page A-38)
- Invoice with Budgets (see page A-41)
- Invoice (see page A-43)
- Invoice by Account Level or Invoice by Account Level V2 (see page A-47)
- Invoice with Shifts (see page A-49)
- Run Total Invoice 2 (see page A-54)
- Zero Cost Center Invoice (see page A-55)

Drill down: None

Parameters:

- Identifier name
- All other parameters are supplied by the invoice report

Report Example

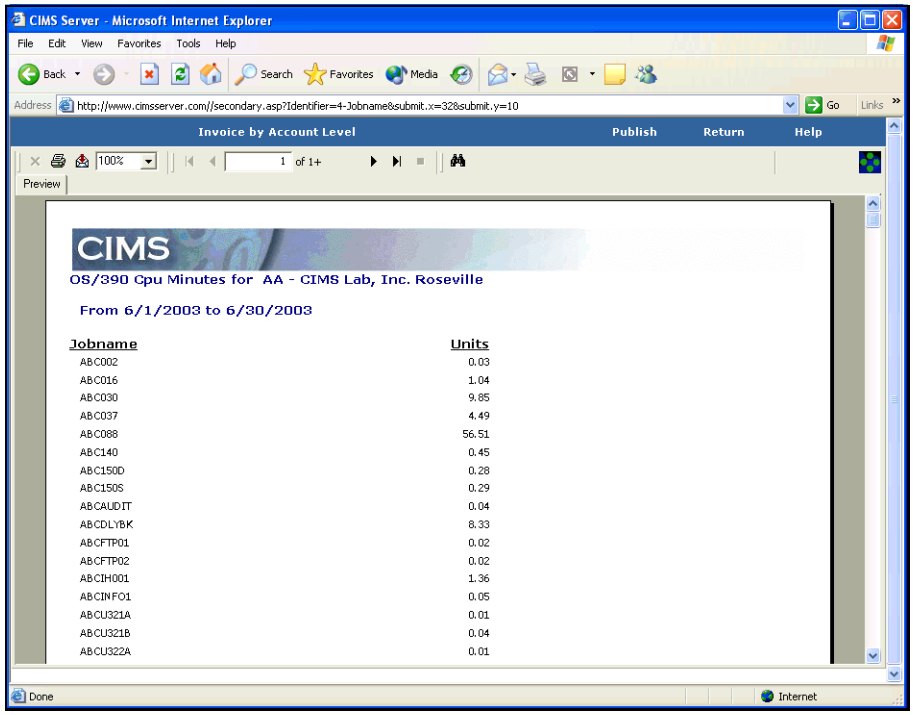


Figure A-6 • Invoice Drill Down for Units Report Example

Invoice Drill Down for Units by Date Report

File name: `IINXC005.rpt`

Stored Procedure: `CIMSSP_Drilldown_by_Rate_Date`

This report is similar to the Invoice Drill Down for Units report (see page A-14). However, it also provides a breakdown of the data by date.

Drill down: None

Parameters:

- Identifier name
- All other parameters are supplied by the invoice report

Report Example

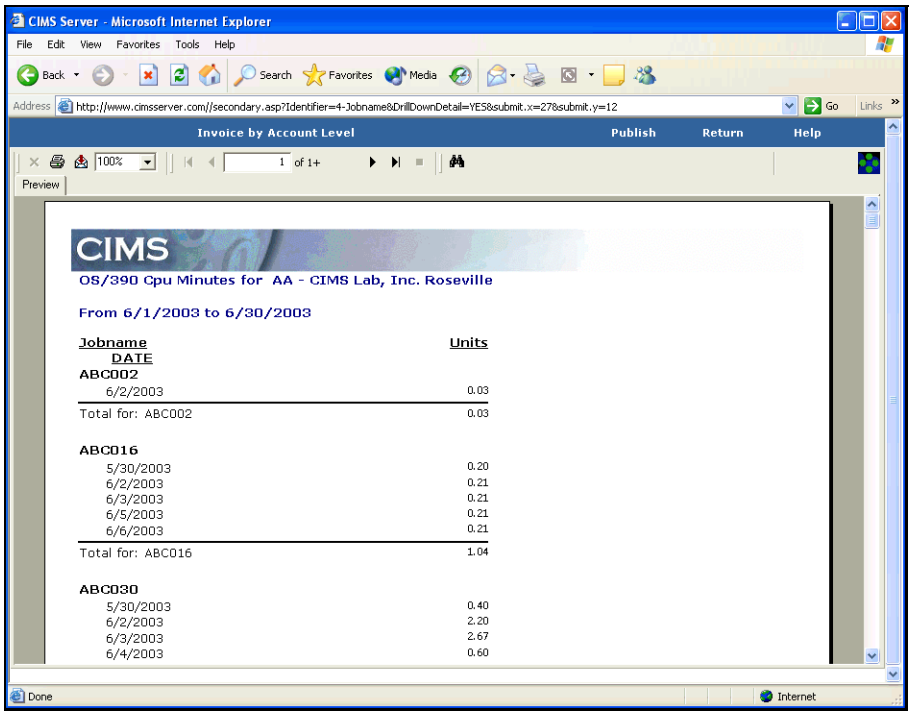


Figure A-7 • Invoice Drill Down for Units by Date Report Example

Multilevel Drill Down for Units Report

File name: IINXC006.rdl (SQL Server Reporting Services)

IINXC006.rpt (Crystal Reports)

Stored Procedure: CIMSSP_Drilldown_3D

This report enables drill down of resource units by up to five identifier names. For example, the report in Figure A-8 on page A-18 provides a drill down of resource units by the identifier values associated with the identifier names System ID, Jobname, and Work ID.

To enable this report, the report file name IINXC006 must be entered in the Configuration dialog box in CIMS Server Administrator (refer to the *CIMS Server Administrator's Guide*). If this option is not set, the Invoice Drill Down for Rate or Invoice Drill Down for Rate by Date report is invoked.

This report invokes from the following reports.

- Alternate Invoice (see page A-38)
- Invoice with Budgets (see page A-41)
- Invoice (see page A-43)
- Invoice by Account Level for Reporting Services (see page A-45)
- Invoice by Account Level or Invoice by Account Level V2 for Crystal Reports (see page A-47)
- Invoice with Shifts (see page A-49)
- Zero Cost Center Invoice (see page A-55).

Drill down: None

Parameters:

- Identifier name 1
- Identifier name 2
- Identifier name 3
- Identifier name 4
- Identifier name 5
- All other parameters are supplied by the invoice report

Report Example

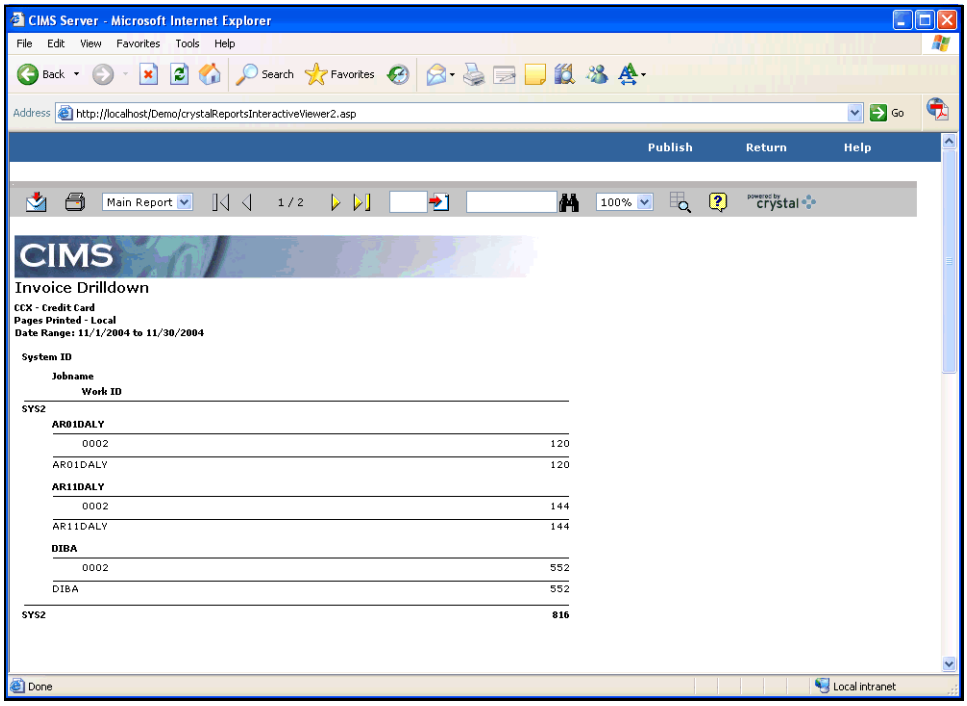


Figure A-8 • Multilevel Drill Down for Units Report Example

Reports

Client Audit Report

File name: RACLX001.rpt

Stored Procedure: CIMSSP_AuditClient

This report tracks changes to the CIMS Client table and contains the following:

- Date and time the change was made
- The type of change that was made:
  - U = update to existing data
  - I = addition of new data
  - D = deletion of data
- Windows user ID
- Client account code
- Old account name (if applicable)
- New account name (if applicable)

Drill down: None

Parameters:

- From and To Date
- Audit Type

Report Example

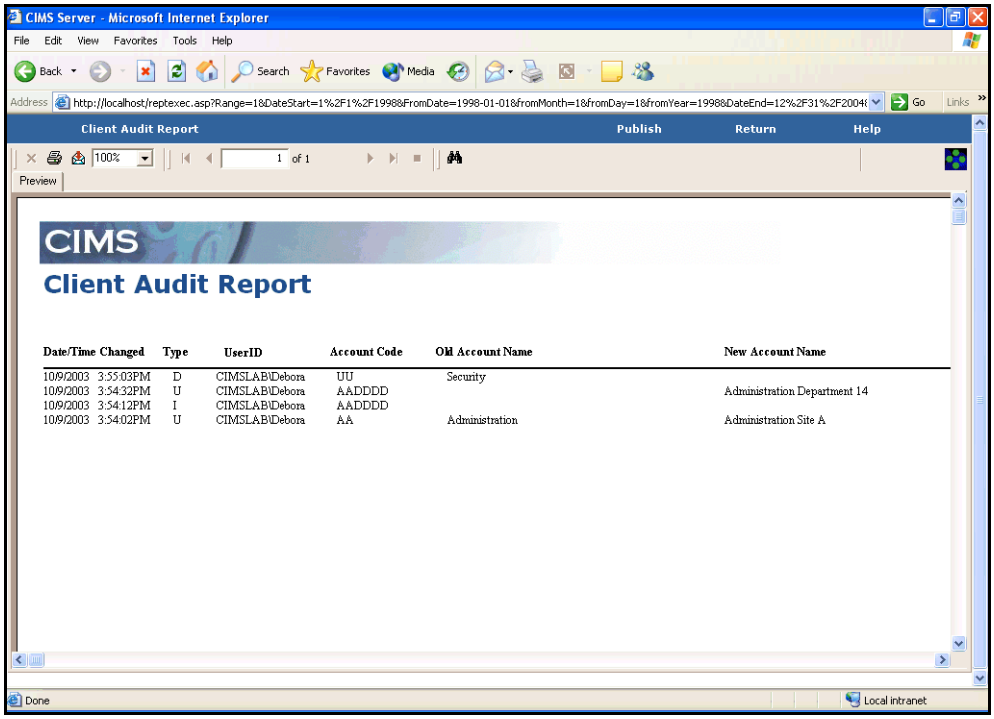


Figure A-9 • Client Audit Report Example

Rate Audit Report

File name: RARTX001.rpt

Stored Procedure: CIMSSP_AuditRate

This report tracks changes to the CIMS Rate table and contains the following:

- Date and time the change was made
- The type of change that was made:
  - U = update to existing data
  - I = addition of new data
  - D = deletion of data
- Windows user ID
- Rate code
- Old and new rate value
- Old and new rate per resource unit or per thousand unit indicator:
  - M (Per thousand units)
  - Blank (Per unit)
- Old and new resource conversion factor:
  - 1 (Divide total resource value by 60)
  - 2 (Divide total resource value by 3600)
  - 3 (Divide total resource value by 1000)
  - 4 (Multiply total resource value by 60)
  - 5 (Divide total resource value by 60000)
  - # (Multiple total resource value by user-defined number)
  - Blank (No conversion factor)
- Old and new zero cost indicator:
  - N (The rate will not be included in zero cost calculations)
  - Blank (The rate will be included in zero cost calculations)

Drill down: None

Parameters:

- From and To Date
- Rate Code
- Audit Type

Report Example

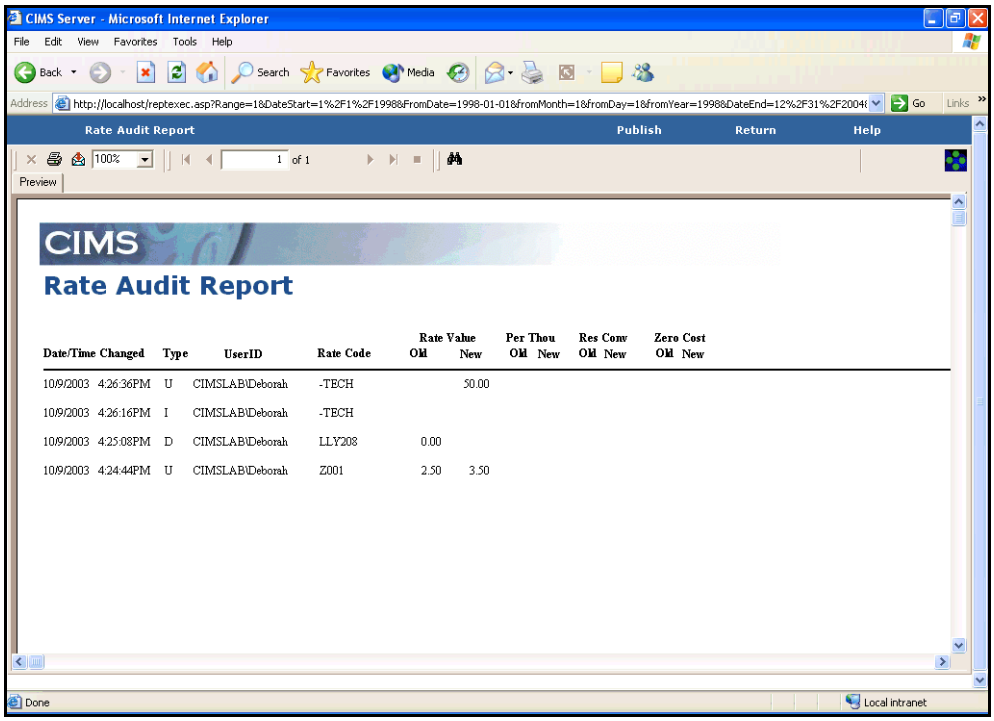


Figure A-10 • Rate Audit Report Example

Transaction Audit Report

File name: RATRX001.rpt

Stored Procedure: CIMSSP_AuditTransaction

This report tracks changes to the CIMS Transaction table and contains the following:

- Date and time the change was made
- The type of change that was made:
  - U = update to existing data or transaction marked as deleted
  - I = addition of new data
- User ID (usually the Windows user ID or SQL Server user ID)
- Account code
- Old and new rate code
- Old and new amount

Drill down: None

Parameters:

- From and To Date
- Audit Type

Report Example

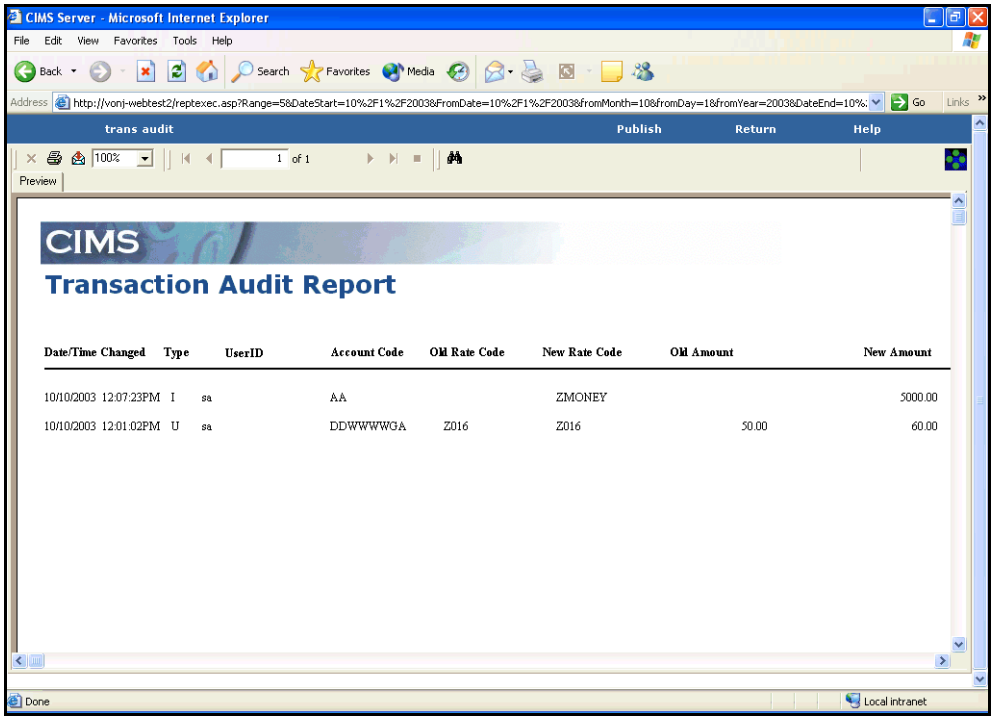


Figure A-11 • Transaction Audit Report Example

Batch Report

File name: RBATR001.rpt

Stored Procedure: CIMSSP_Batch

This report provides OS/390 batch job data for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

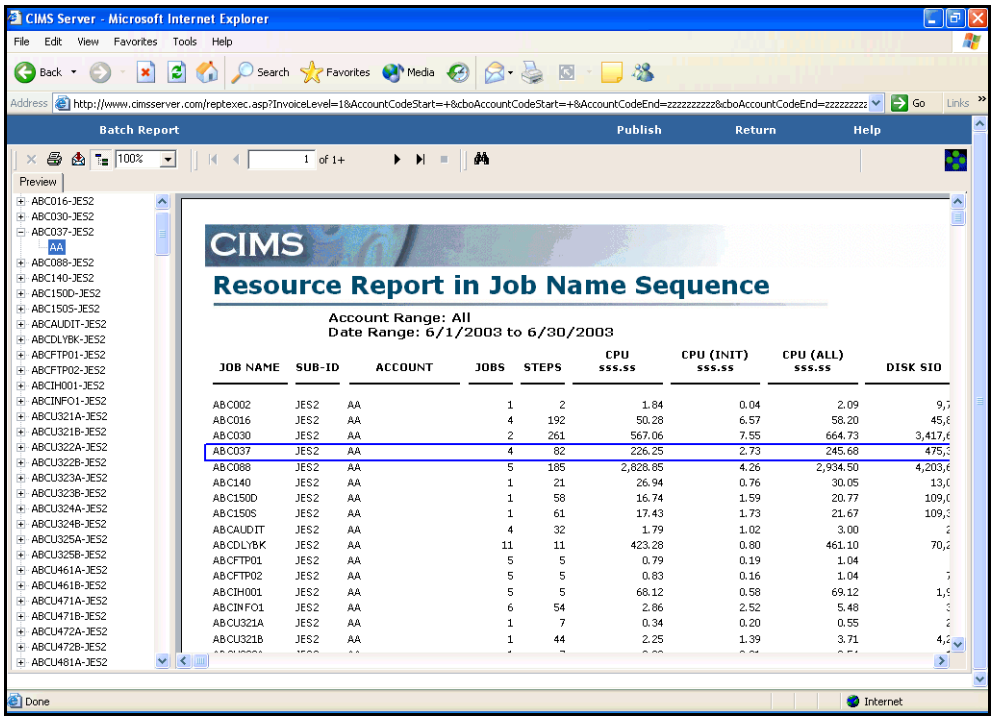


Figure A-12 • Batch Report Example

Account Budget for Period and YTD Report

File name: RBGTC001.rpt

Stored Procedure: None

This report provides actual, budget, and difference charges by account code for the parameters selected. This report includes totals for the calendar period selected and year to date (YTD).

This report reflects the amount for the Overall Account Budget for the account code as set in the CIMS Client Budget table. For more information about setting budgets, refer to the *CIMS Server Administrator's Guide*.

Drill down: None

Parameters:

- Starting and Ending Account Code
- Account Code Level
- Calendar Period

Report Example

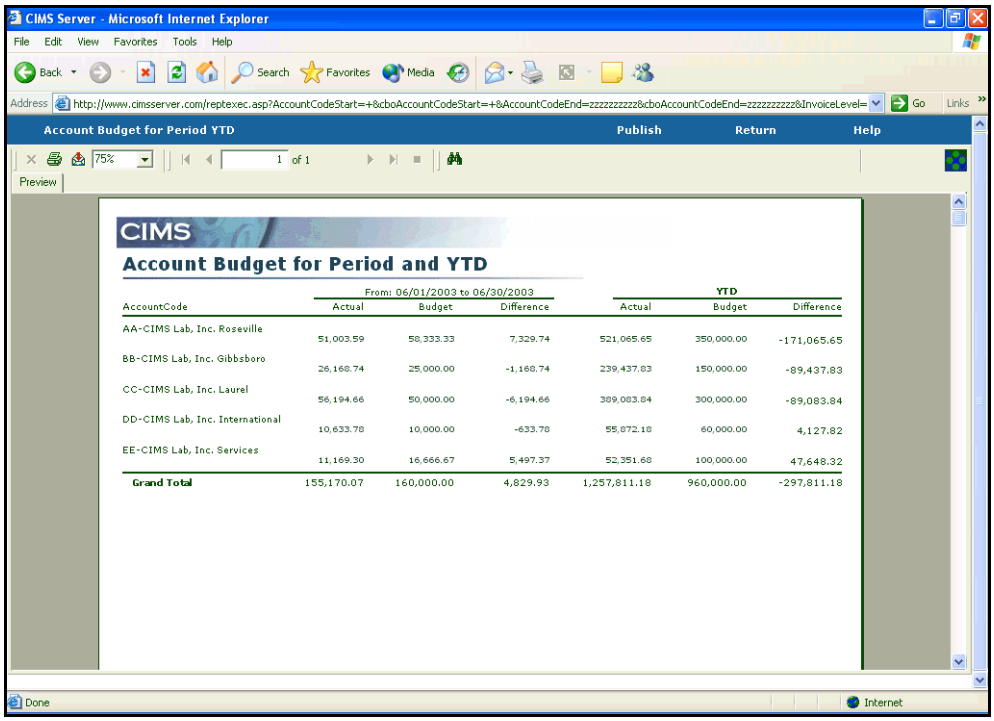


Figure A-13 • Account Budget for Period and YTD Report Example

Line Item Budget for Period and YTD Report

File name: RBGTC002.rpt

Stored Procedure: CIMSSP_LineItem_Budget

This report provides actual, budget, and difference charges by account code, rate group and rate code description for the parameters selected. This report includes totals for the calendar period selected and YTD.

This report reflects the amount for the individual resource budgets for the account code as set in the CIMS Client Budget table. For more information about setting budgets, refer to the *CIMS Server Administrator's Guide*.

Drill down: None

Parameters:

- Account Code Level
- Calendar Period
- Starting and Ending Account Code

Report Example

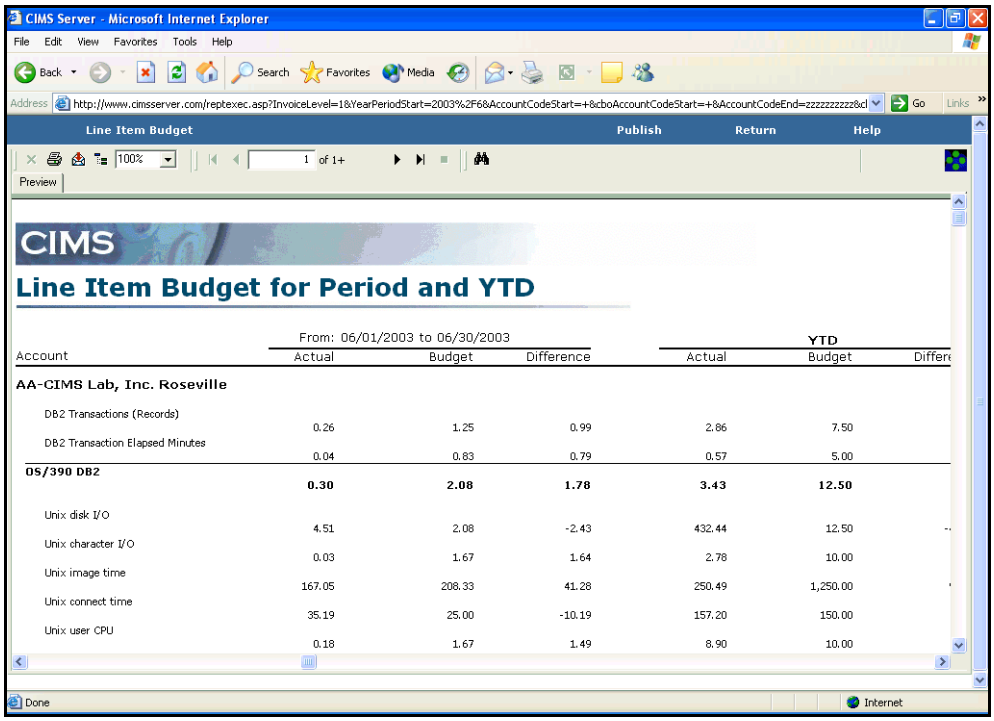


Figure A-14 • Line Item Budget for Period and YTD Report Example

Configuration Report

File name: RCFGX001.rpt

Stored procedure: None

This report provides information contained in the CIMS Configuration table.

Drill down: None

Parameters: None

Report Example

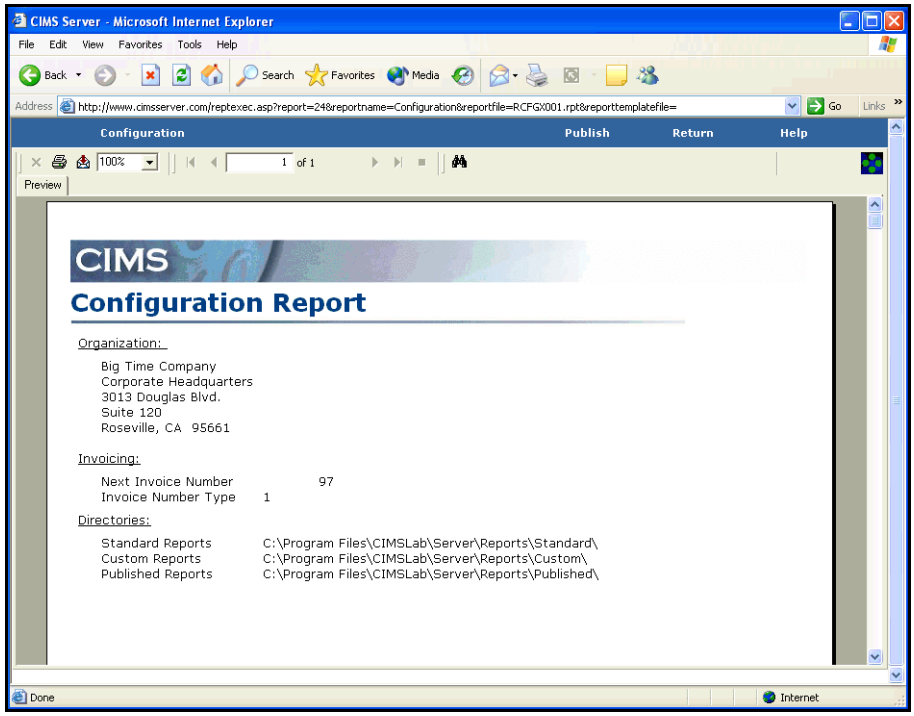


Figure A-15 • Configuration Report Example

CICS Transaction Report

File name: RCICR001.rpt

Stored Procedure: CIMSSP_CICS

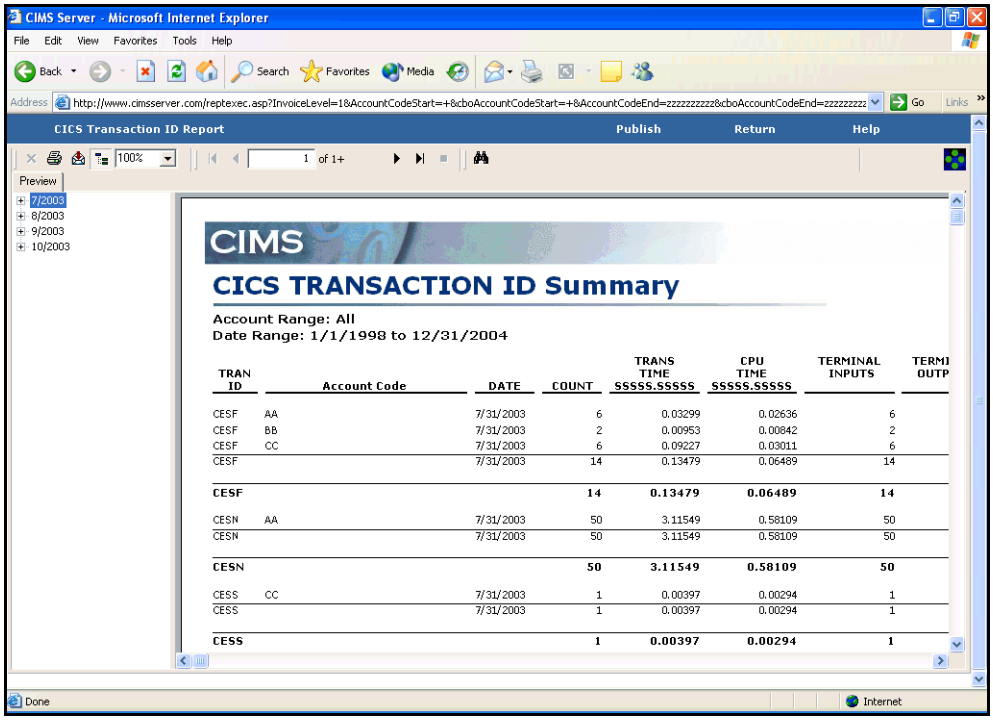
This report provides data for CICS transactions by transaction ID for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Trans ID Start
- Trans ID End

Report Example



TRAN ID	Account Code	DATE	COUNT	TRANS TIME SSSSS.SSSSS	CPU TIME SSSSS.SSSSS	TERMINAL INPUTS	TERMI OUTP
CESF	AA	7/31/2003	6	0.03299	0.02636	6	
CESF	BB	7/31/2003	2	0.00953	0.00842	2	
CESF	CC	7/31/2003	6	0.09227	0.03011	6	
CESF		7/31/2003	14	0.13479	0.06489	14	
CESF			**14**	**0.13479**	**0.06489**	**14**	
CESN	AA	7/31/2003	50	3.11549	0.58109	50	
CESN		7/31/2003	50	3.11549	0.58109	50	
CESN			**50**	**3.11549**	**0.58109**	**50**	
CESS	CC	7/31/2003	1	0.00397	0.00294	1	
CESS		7/31/2003	1	0.00397	0.00294	1	
CESS			**1**	**0.00397**	**0.00294**	**1**	

Figure A-16 • CICS Transaction Report Example

Client Report

File name: RCLTX001.rpt

Stored procedure: None

This report provides the information contained in the CIMS Client table for the parameters selected.

Drill down: None

Parameters:

- Starting and Ending Account Code

Report Example

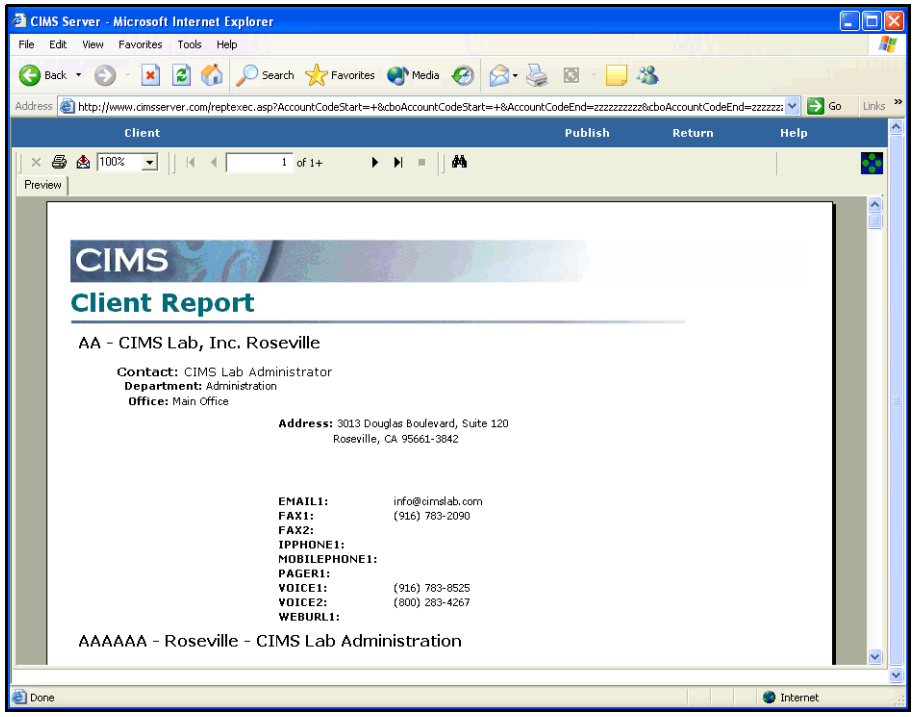


Figure A-17 • Client Report Example

Account Summary Daily Report

File name: RDAYC001.rpt

Stored Procedure: CIMSSP_Summary_Day

This report provides total daily and monthly charges by account code and rate code description for the parameters selected.

Drill down:

- Double-click a day or the charge for a day and a breakdown of charges by rate code description for the day appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

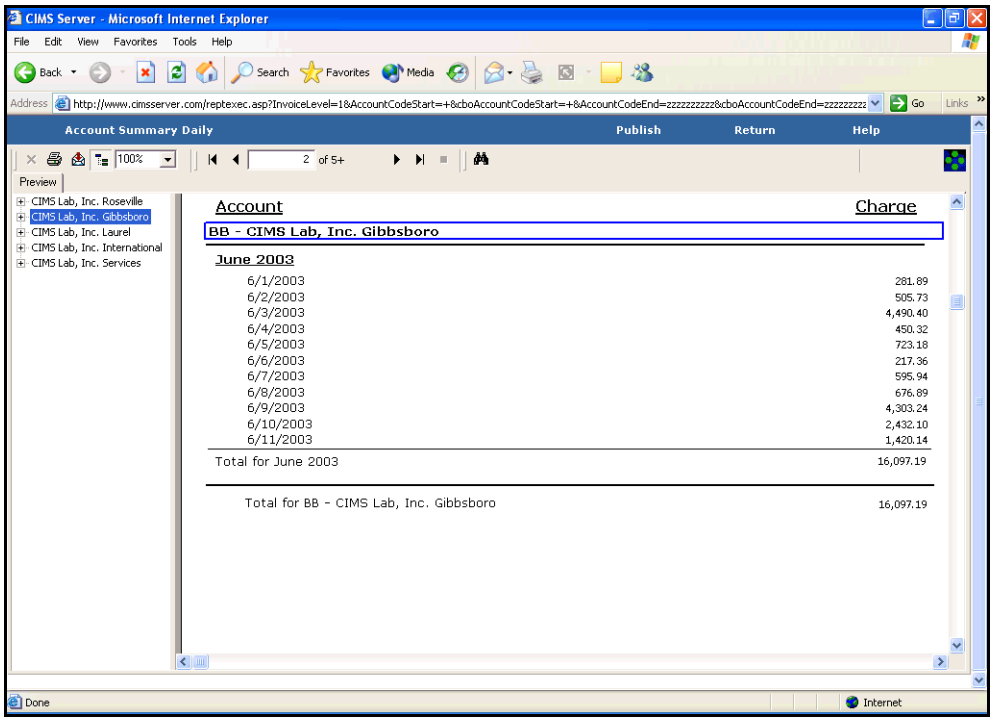


Figure A-18 • Account Summary Daily Report Example

Account Summary Daily 2 Report

File name: RDAYC002.rpt

Stored Procedure: CIMSSP_Summary_Day

This report is similar to the Account Summary Daily report (see page A-30). However, the month (rather than the account code) appears as the top level of the report.

Drill down:

- Double-click a day or the charge for a day and a breakdown of charges for the day by account code appears. Double-click an account code and a breakdown of charges for the day by rate code description appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

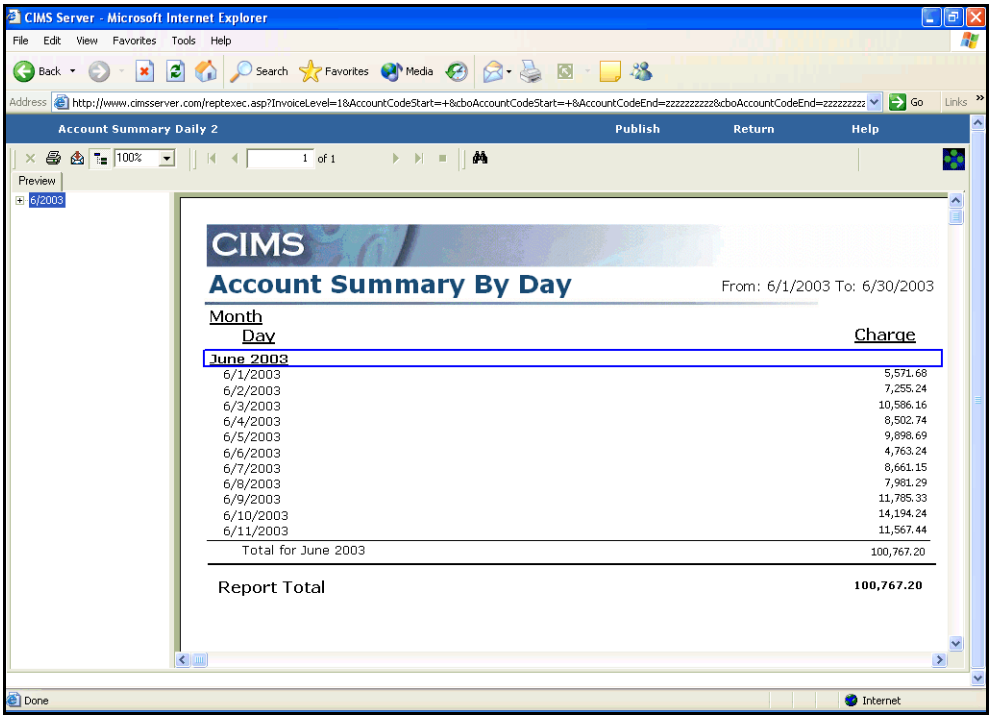


Figure A-19 • Account Summary Daily 2 Report Example

DB2 Summary Report

File name: RDB2R001.rpt

Stored Procedure: CIMSSP_DB2

This report provides DB2 data for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

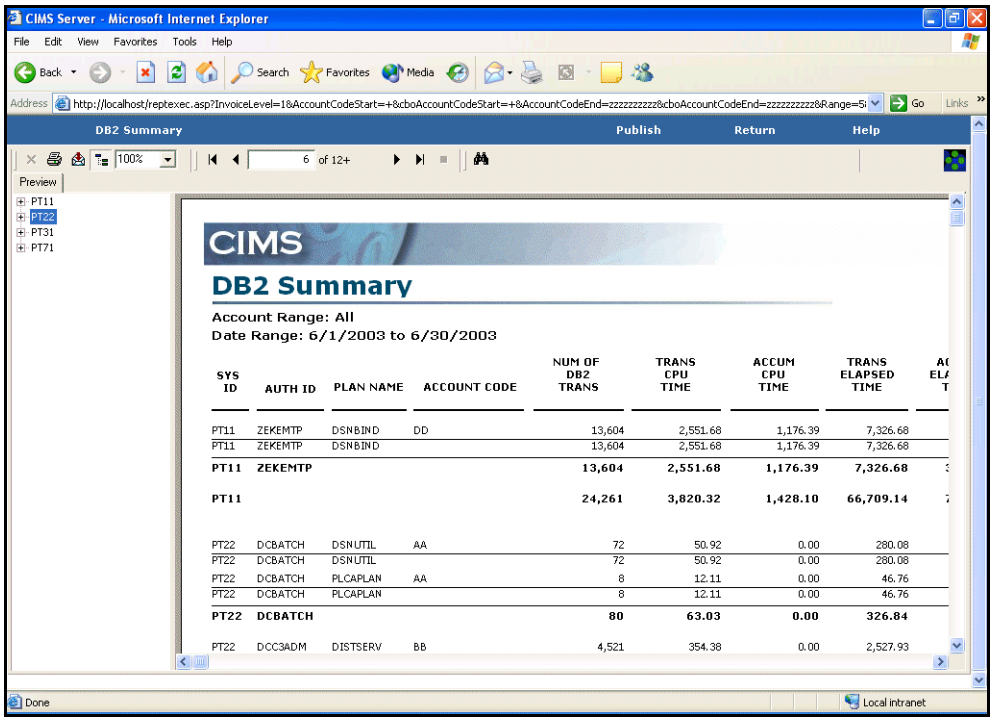


Figure A-20 • DB2 Summary Report Example

Detail by Rate Group Report

File name: RDETR001.rpt

Stored Procedure: CIMSSP_Drilldown_by_RateGroup

This report provides total resource units used for the first eight rate code descriptions in a rate group for the parameters selected. If applicable, a total for the next highest level of the account code appears. For example, in Figure A-21, total units appear for account codes AAAAAA, AADDDD, AAFFFF, and AAMMMM. The sum of these totals appears for account code AA (the next highest level).

Drill down: **None**

Parameters:

- Rate Group
- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

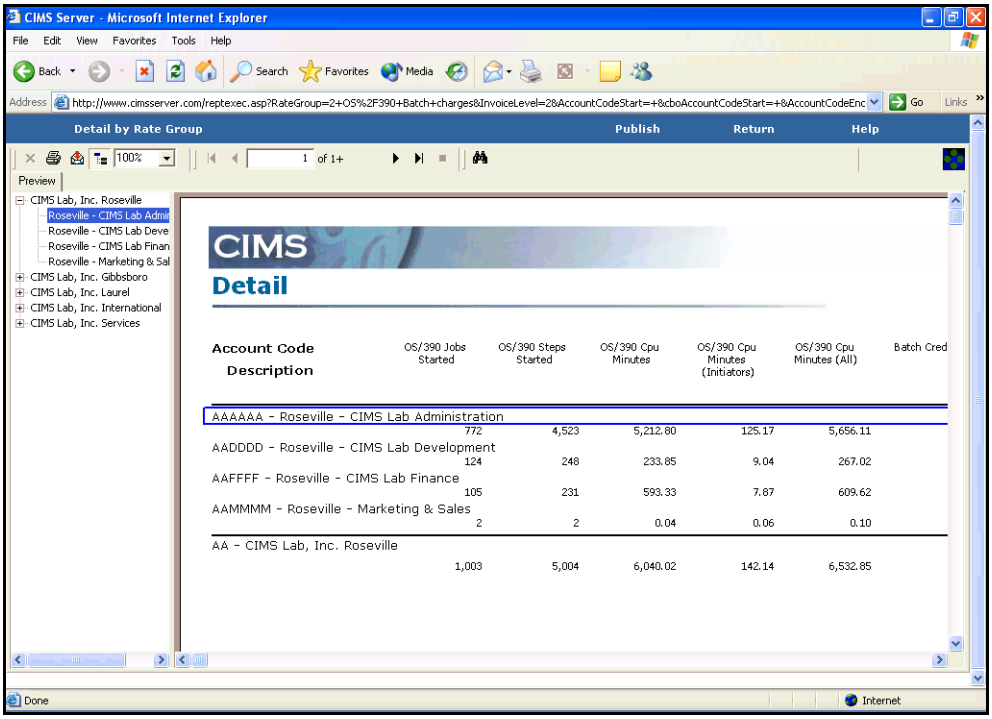


Figure A-21 • Detail by Rate Group Report Example

Detail by Rate Group/Identifier Report

File name: RDETR002.rpt

Stored Procedure: CIMSSP_Drilldown_by_RateGroup_Identifier

This report is similar to the Detail by Rate Group report (see page A-33). However, the resource units are broken down by identifier value for the identifier name selected.

Drill down: None

Parameters:

- Rate Group
- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Identifier

Report Example

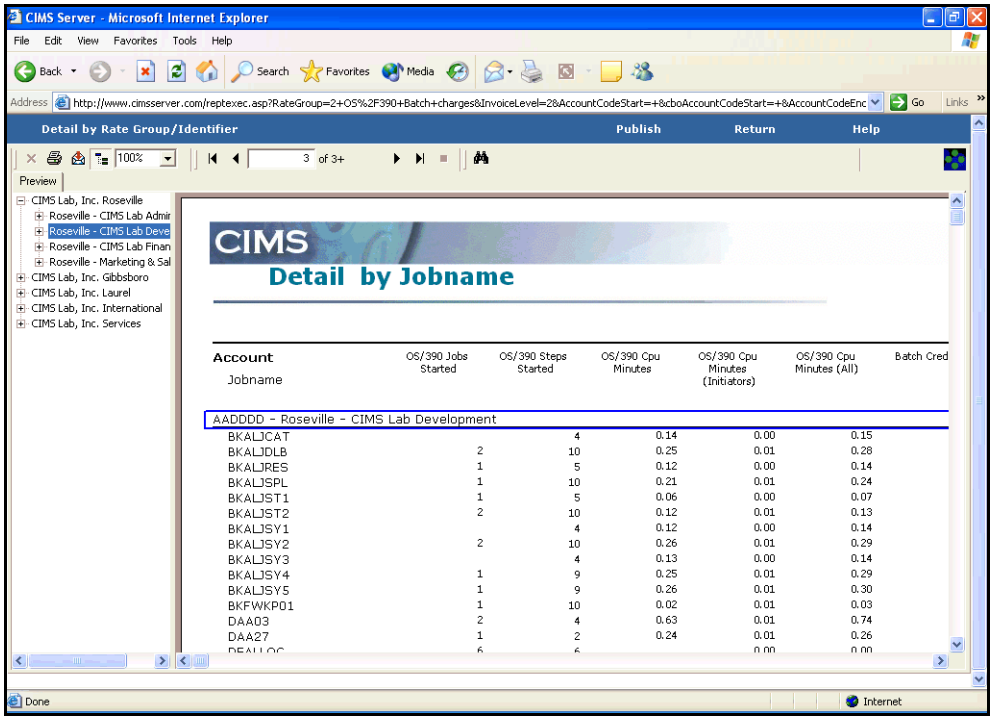


Figure A-22 • Detail by Rate Group/Identifier Report Example

Detail Rate Codes by Identifiers

File name: RDRIR001.rpt

Stored Procedure: CIMSSP_Detail_I5_R5

This report shows resource units consumed for a maximum of five rate codes and five identifiers.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Codes (5 maximum)
- Identifiers (5 maximum)

Report Example

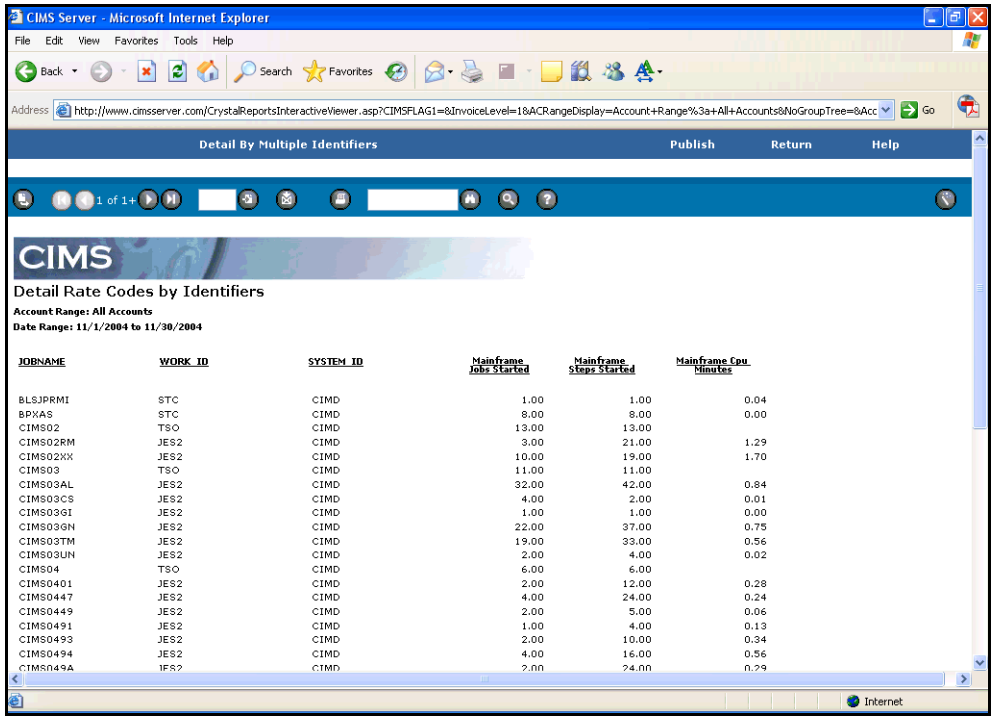


Figure A-23 • Detail Rate Codes by Identifiers Report Example

Detail Rate Codes by Identifiers/Account

File name: RDRIR002.rpt

Stored Procedure: CIMSSP_Detail_I5_R5

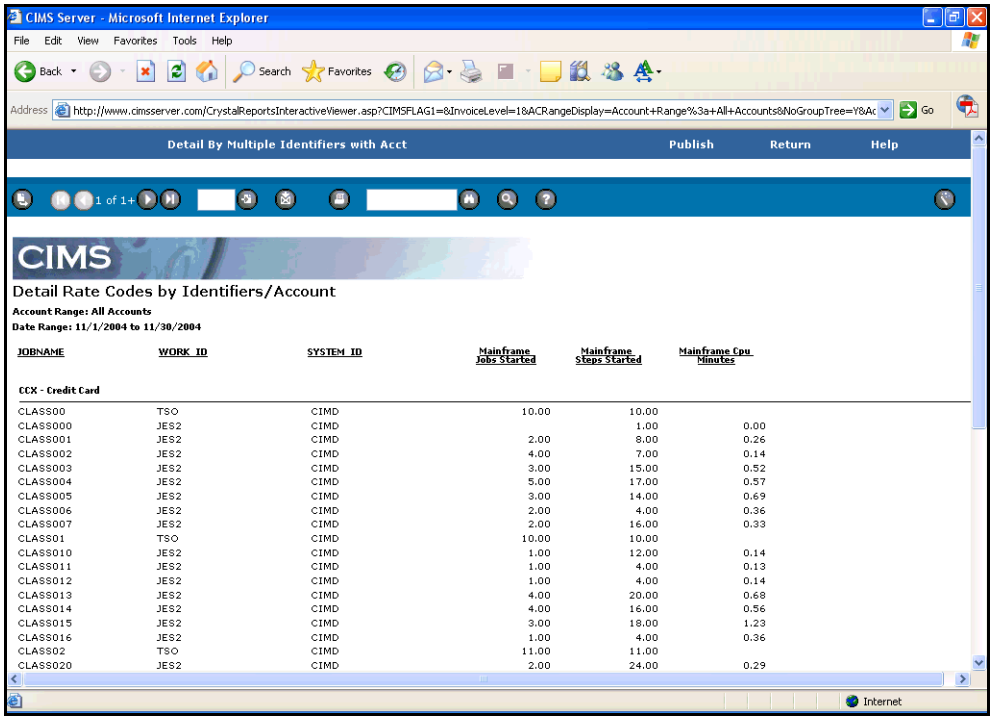
This report shows resource units consumed by account code for a maximum of five rate codes and five identifiers.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Codes (5 maximum)
- Identifiers (5 maximum)

Report Example



Detail Rate Codes by Identifiers/Account Report Example

MS Exchange 2000 Resource Report

File name: REX2R001.rpt

Stored Procedure: CIMSSP_Detail_Resource

This report provides Exchange 2000 Server data for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

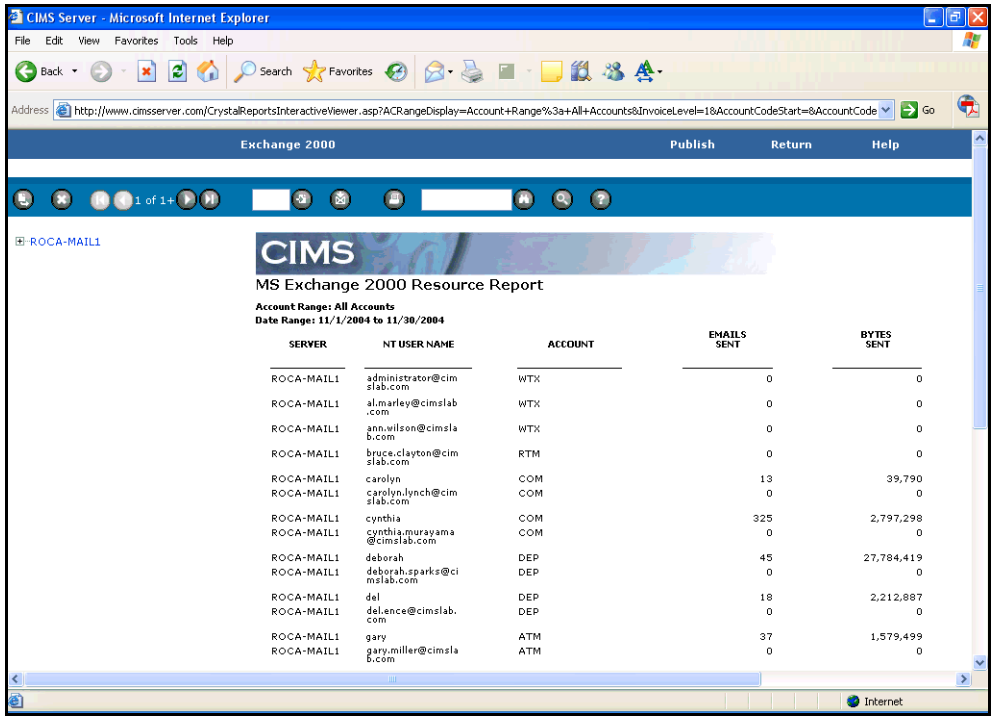


Figure A-24 • MS Exchange 2000 Resource Report Example

Invoice by Account Level V2 Report

File name: RINVC001.rpt

See *Invoice by Account Level Report (Crystal Reports)* on page A-47.

Alternate Invoice Report

File name: RINVC002.rpt

Stored Procedure: CIMSSP_Summary

This report provides charges by account code and rate code description for the parameters selected. An optional graph showing total expenses by account code is also included.

Drill down:

- Double-click a bar on the graph and the invoice appears.
- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (see page A-16), or Multilevel Drill Down for Units (see page A-17).
- Double-click a rate code description or its corresponding rate or charge and the next lower level of the account structure appears. This drill down can be continued through the account structure.

Parameters:

- Account Code Level
- Invoice Number
- Display Graph
- Starting and Ending Account Code
- From and To Date

Report Example

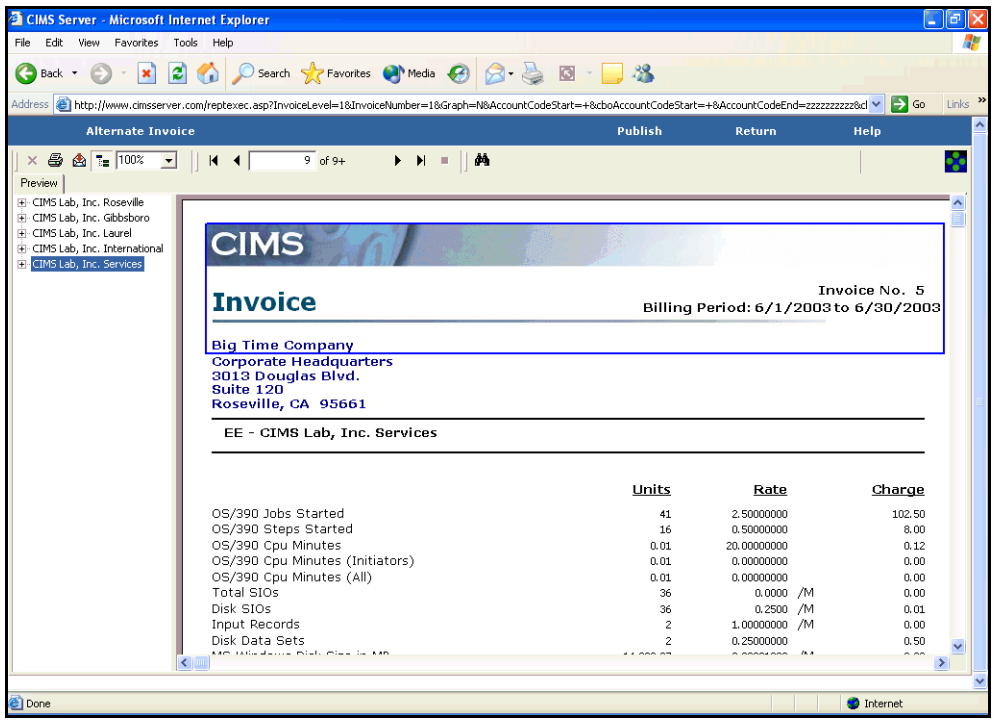


Figure A-25 • Alternate Invoice Report Example

Account Total Invoice Report

File name: RINVC003.rpt

Stored Procedure: CIMSSP_Account_Summary

This report provides the total charges by each level of the account code structure for the parameters selected.

Drill down:

- Click the **Invoice** link and a complete invoice for the account code level appears (see *Invoice Report* on page A-43).

Parameters:

- Starting and Ending Account Code
- From and To Date

Report Example

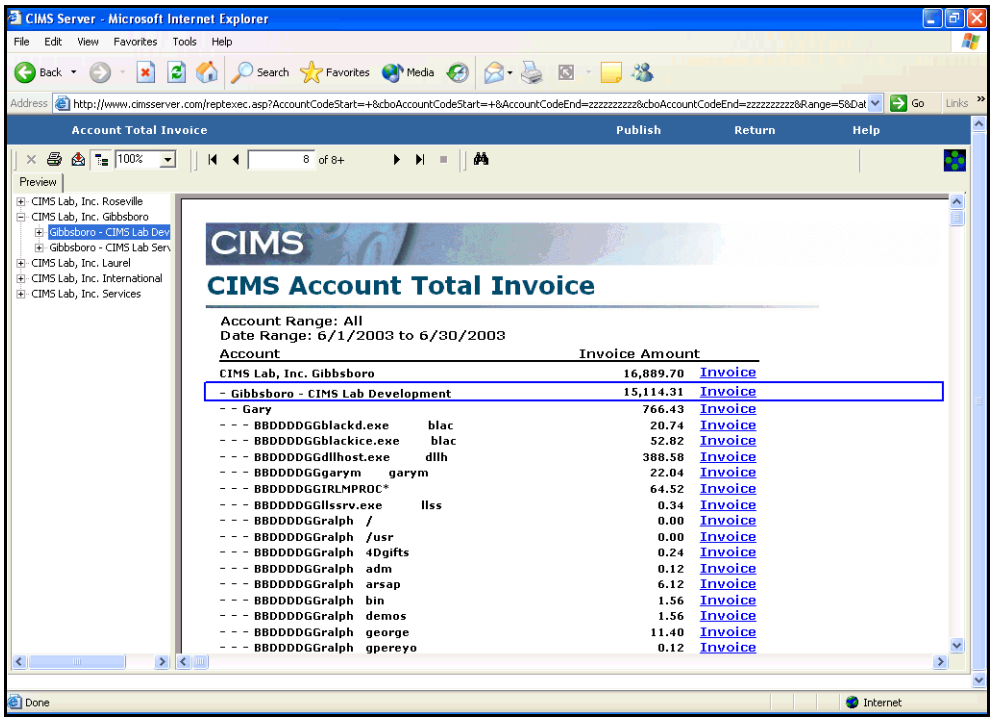


Figure A-26 • Account Total Invoice Report Example

Invoice with Budget Report

File name: `RINVC004.rpt`

Stored Procedure: `CIMSSP_LineItem_Budget`

This report provides charges by account code, rate code description, and rate group for the parameters selected. This report also includes a Budget and Variance field for the calendar period selected and YTD Charges, Budget, and Variance fields.

Drill down:

- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (page A-16), or Multilevel Drill Down for Units (see page A-17).
- Click the rate group name in the **Total** line and a new page appears to enable a drill down of charges by identifier. This page invokes the report Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13).

Parameters:

- Account Code Level
- Calendar Period
- Invoice Number
- Starting and Ending Account Code

Report Example

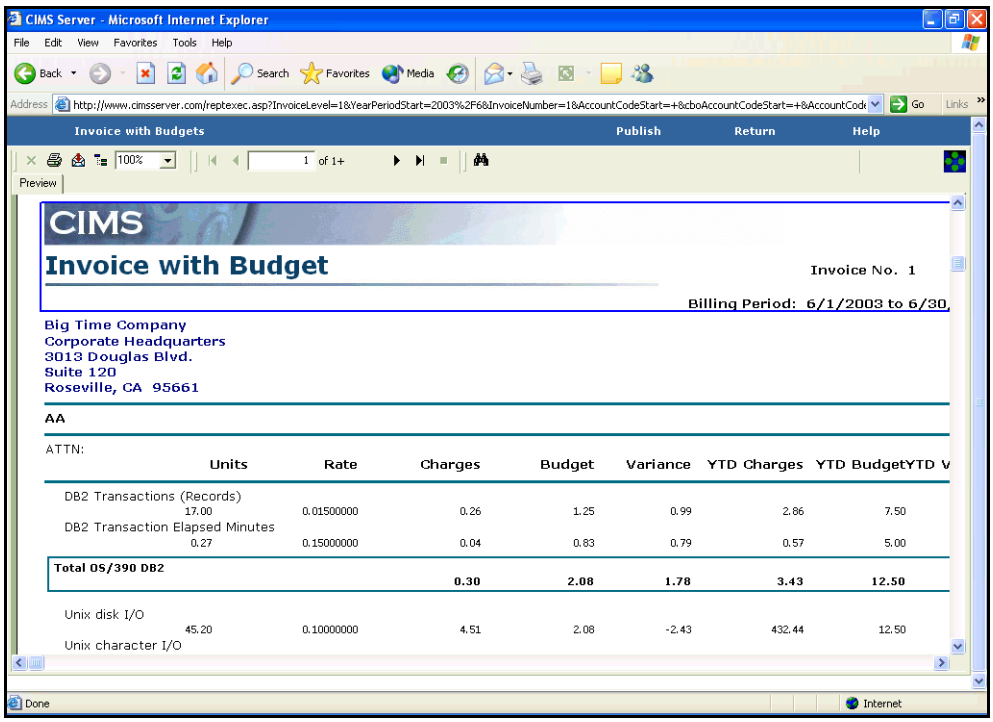


Figure A-27 • Invoice with Budget Report Example

Invoice Report

File name: RINVC006.rpt

Stored Procedure: None

This report provides charges by account code, rate code description, and rate group for the parameters selected. This report is invoked by clicking the **Invoice** link for the account code in the following reports.

- Account Total Invoice (see page A-38)
- Top Cost (see page A-63)
- Top 10 Bar Graph (see page A-65)
- Top 10 Pie Chart (see page A-67)

Drill down:

- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (page A-16), or Multilevel Drill Down for Units (see page A-17).
- Click the rate group name in the **Total** line and a new page appears to enable a drill down of charges by identifier. This page invokes the report Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13).

Parameters:

- All parameters are supplied by the report from which the invoice is invoked.

Report Example

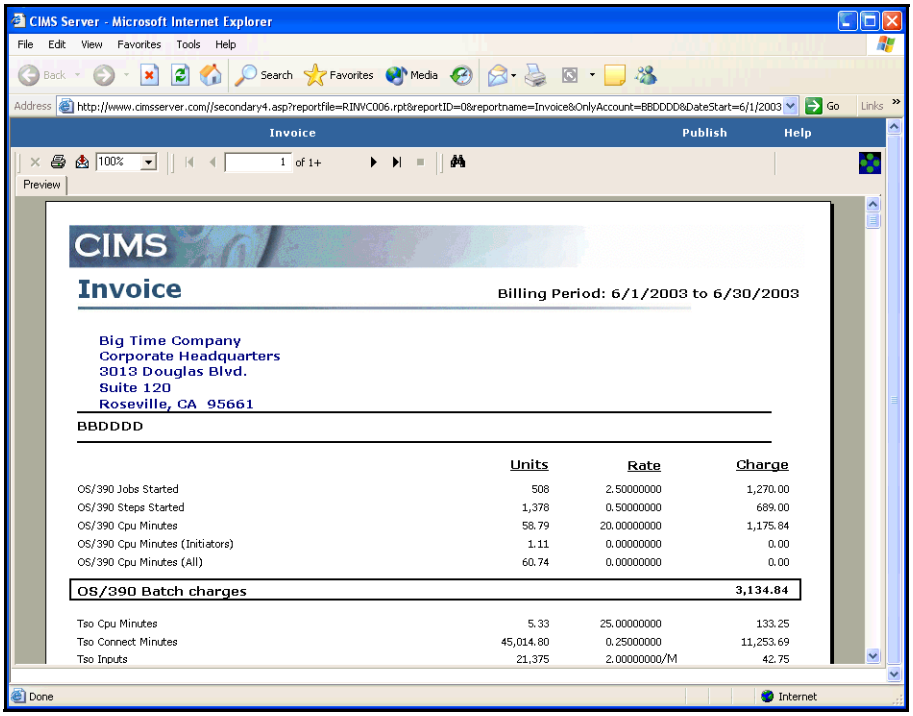


Figure A-28 • Invoice Report Example

Invoice by Account Level Report (SQL Server Reporting Services)

File name: `RINVC007.rdl`

Stored Procedure: `CIMSSP_Summary`

This key report provides charges by account code, rate group, and rate code description for the parameters selected. An optional graph showing total expenses by account code is also included.

Drill down:

- Double-click a bar on the graph and the invoice appears.
- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Multilevel Drill Down for Units (see page A-17).
- Click the rate group name and a new page appears to enable a drill down of charges by identifier. This page invokes the report Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13).
- Double-click a rate code description and the next lower level of the account structure appears. This drill down can be continued through the account structure.

Parameters:

- Account Code Level
- Invoice Number
- Display Graph
- Starting and Ending Account Code
- From and To Date

Report Example

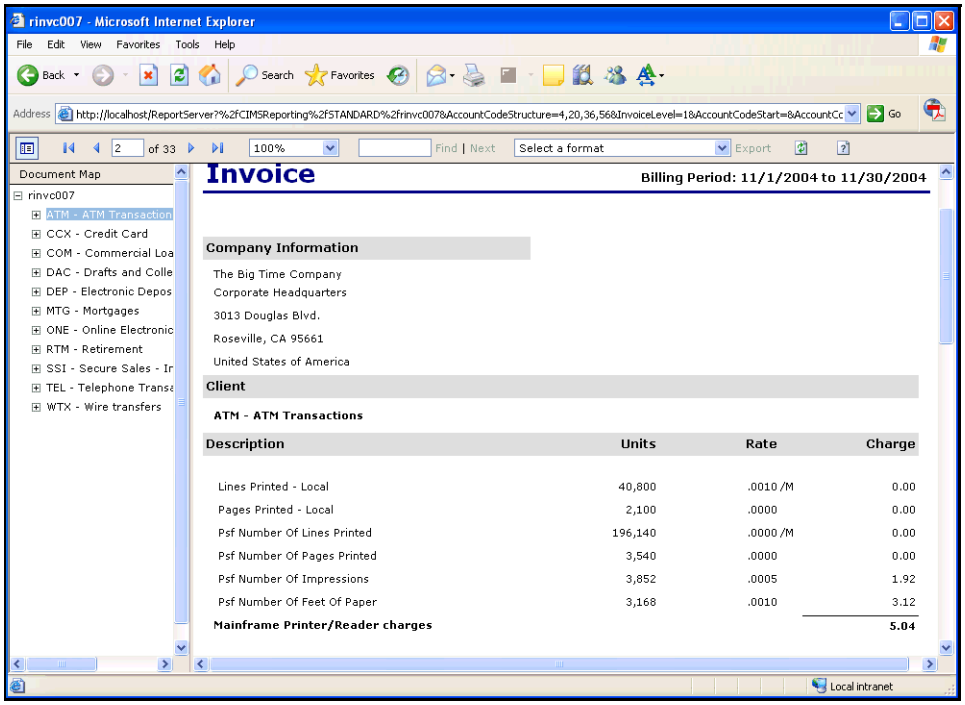


Figure A-29 • Invoice by Account Level Report Example (Reporting Services)

Invoice by Account Level Report (Crystal Reports)

File name: `RINVC007.rpt`

Stored Procedure: `CIMSSP_Summary`

This key report provides charges by account code, rate group, and rate code description for the parameters selected. An optional graph showing total expenses by account code is also included.

Drill down:

- Double-click a bar on the graph and the invoice appears.
- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (page A-16), or Multilevel Drill Down for Units (see page A-17).
- Click the rate group name and a new page appears to enable a drill down of charges by identifier. This page invokes the report Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13).
- (Invoice by Account Level V2 only) Double-click a rate code description or its corresponding rate or charge and the next lower level of the account structure appears. This drill down can be continued through the account structure.

Parameters:

- Account Code Level
- Invoice Number
- Display Graph
- Starting and Ending Account Code
- From and To Date

Report Example

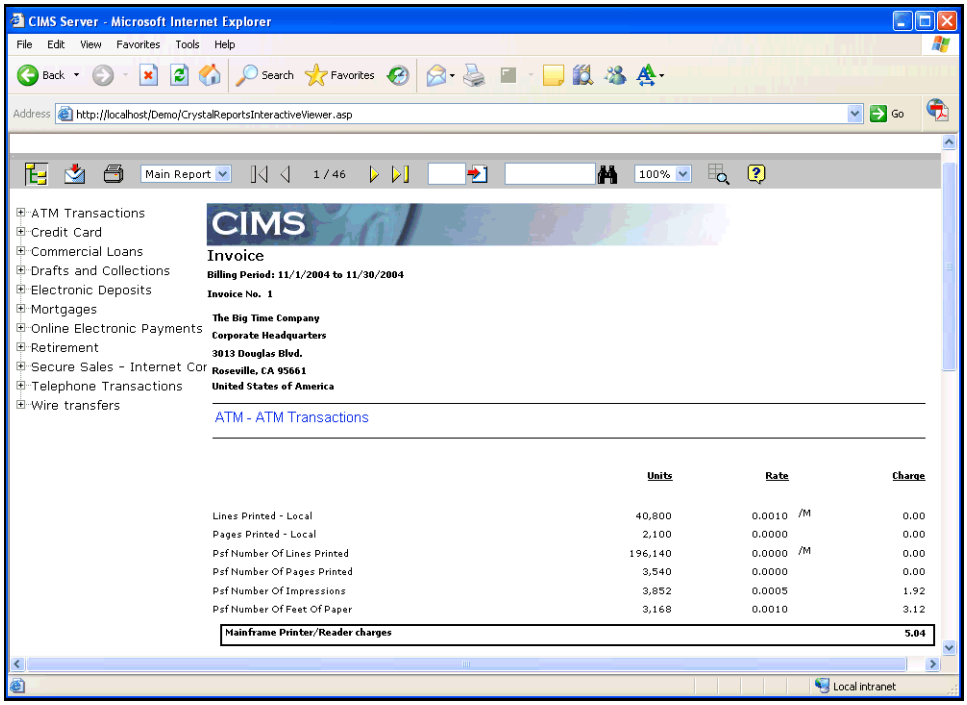


Figure A-30 • Invoice by Account Level Report Example (Crystal Reports)

Invoice with Shifts Report

File name: `RINVC009.rpt`

Stored Procedure: `CIMSSP_Summary_Shift`

If the CIMSSummary table contains multiple shift codes for a rate code, this report provides charges by account code, rate group, and rate code description broken down by shift for the parameters selected.

Drill down:

- Double-click a bar on the graph and the invoice appears.
- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (page A-16), or Multilevel Drill Down for Units (see page A-17).
- Click the rate group name in the **Total** line and a new page appears to enable a drill down of charges by identifier. This page invokes the Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13) report.

Parameters:

- Account Code Level
- Invoice Number
- Display Graph
- Starting and Ending Account Code
- From and To Date

Report Example

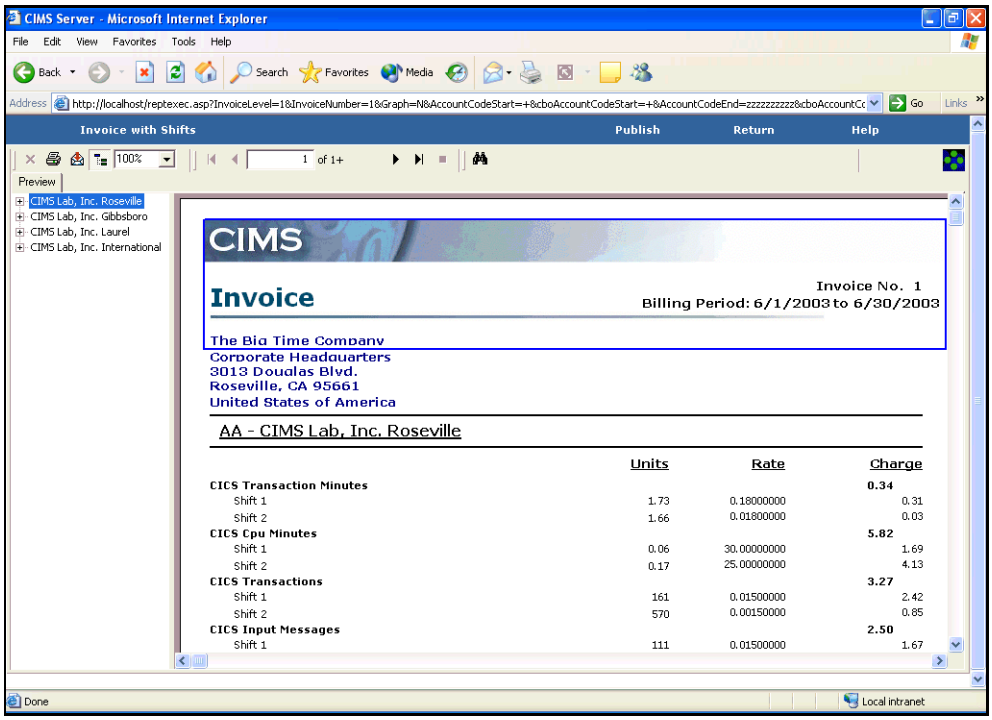


Figure A-31 • Invoice with Shifts Report Example

Run Total Invoice Report

File name: `RIVTC001.rpt`

Stored Procedure: `CIMSSP_Summary`

This report provides total charges by rate group and rate code description for the parameters selected.

Drill down:

- Double-click a rate code description or its corresponding units, rate, or charge and and a breakdown of data by account code appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

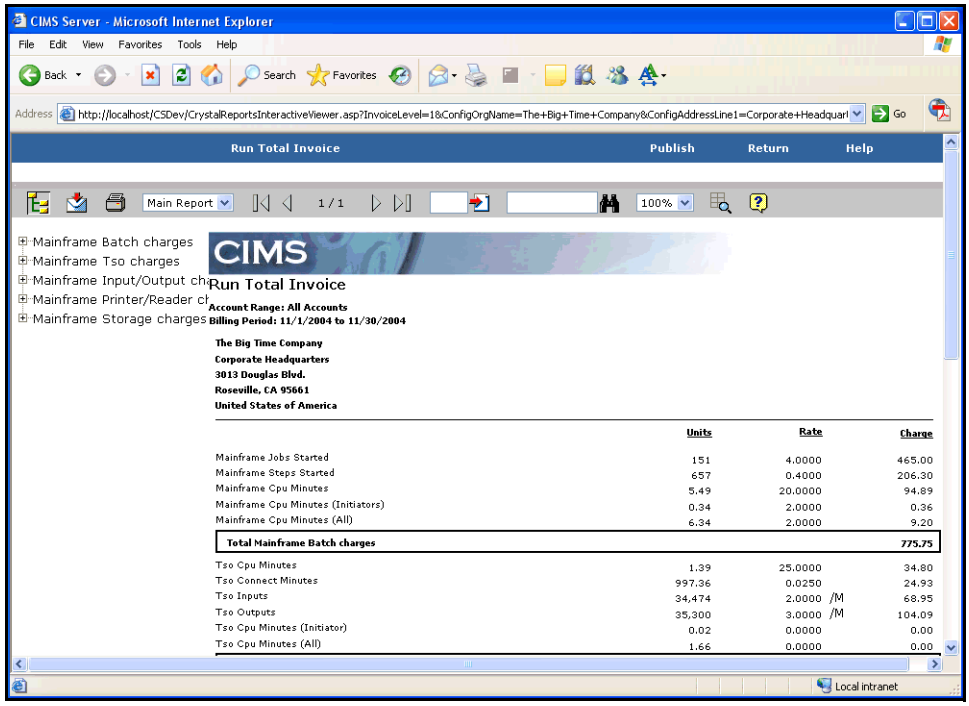


Figure A-32 • Run Total Invoice Report Example

Run Total Percent Report

File name: RIVTC002.rpt

Stored Procedure: CIMSSP_Summary

This report is the same as the Run Total Invoice report (see page A-51) except that the drill down includes percent total by account code in addition to units, rate, and charge.

Drill down:

- Double-click a rate code description or its corresponding units, rate, or charge and and a breakdown of data by account code appears.

  You can set the number of account codes that appear in the drill down using the TopN parameter. For example, if you type 2 as the TopN parameter, only the account codes with the highest and second highest charges appear when you drill down. If you leave the TopN parameter blank, all account codes for the parameters selected appear.

Parameters:

- Account Code Level
- TopN
- Starting and Ending Account Code
- From and To Date

Run Total Rate Group Percent Report

File name: `RIVTCO03.rpt`

Stored Procedure: `CIMSSP_Summary`

This report provides charges and percentage by rate groups for the parameters selected.

Drill down:

- Double-click the charge or percentage for a rate code description and breakdown of data by account code appears.

  You can set the number of account codes that appear in the drill down using the TopN parameter. For example, if you type `2` as the TopN parameter, only the account codes with the highest and second highest charges appear when you drill down. If you leave the TopN parameter blank, all account codes for the parameters selected appear.

Parameters:

- Account Code Level
- TopN
- Starting and Ending Account Code
- From and To Date

Report Example

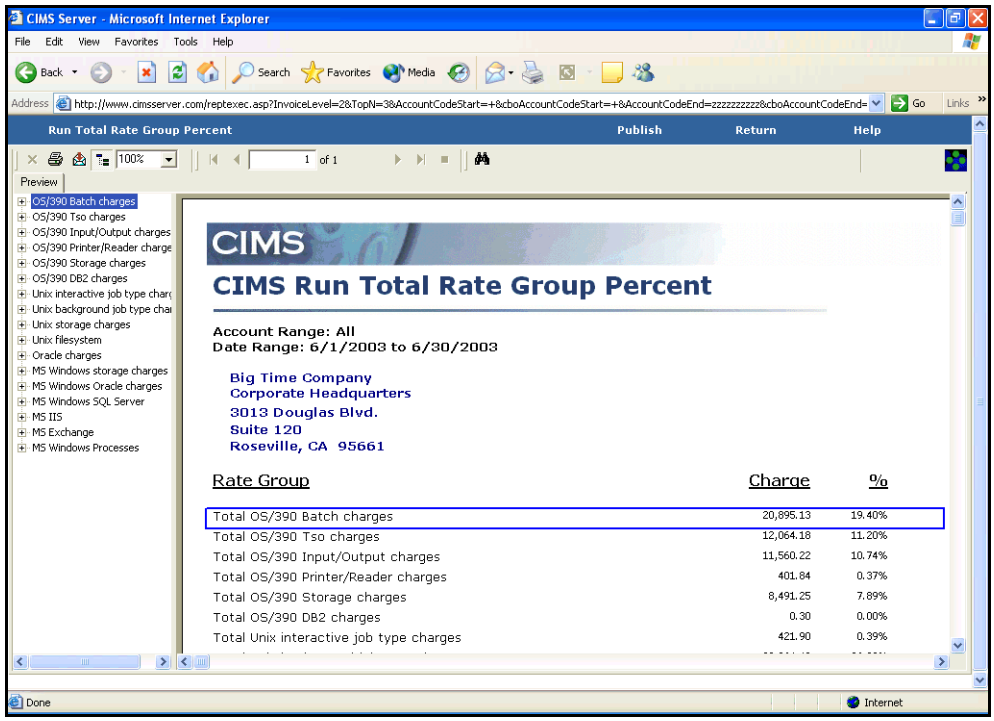


Figure A-33 • Run Total Rate Group Percent Report Example

Run Total Invoice with Shifts

File name: `RIVTC004.rpt`

Stored Procedure: `CIMSSP_Summary`

This report is the same as the Run Total Invoice report (see page A-51) except that the units, rate, and charges for each rate code description are broken down by shift if the CIMSSummary table contains multiple shift codes for a rate code.

Drill down:

- Double-click a rate code description or its corresponding units, rate, or charge and and a breakdown of data by account code appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

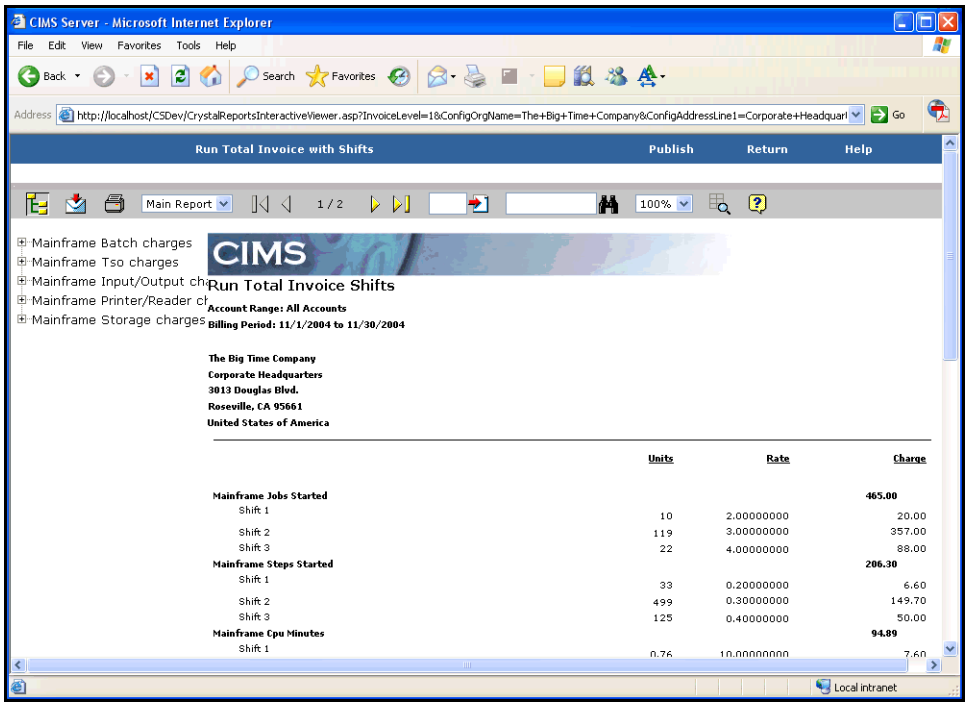


Figure A-34 • Run Total Invoice with Shifts Report Example

Zero Cost Center Invoice Report

File name: `RIVZC001.rpt`

Stored Procedure: None

This report provides zero cost invoicing by account code for the parameters selected. You can adjust the total invoice amount or the amount for each rate by the zero cost amount.

This report first displays the Zero Cost Center Factor Report. The Zero Cost Center Factor Report shows the zero factor difference between the total amount due for all account codes and the zero cost amount. You can run the Zero Cost Center Factor Report independently (see page A-57).

Drill down:

- Click the units for a rate and a new page appears to enable a drill down of units by identifier. This page invokes the report Invoice Drill Down for Rate (see page A-14), Invoice Drill Down for Units by Date (page A-16), or Multilevel Drill Down for Units (see page A-17).
- Click the rate group name in the **Total** line and a new page appears to enable a Drill down of charges by identifier. This page invokes the report Invoice Drill Down for Rate Group (see page A-11) or Invoice Drill Down for Rate Group by Date (see page A-13).

Parameters:

- Starting and Ending Account Code
- Account Code Level
- From and To Date
- Invoice Number
- Zero Cost Processing Option
- Zero Cost Amount

Report Examples:

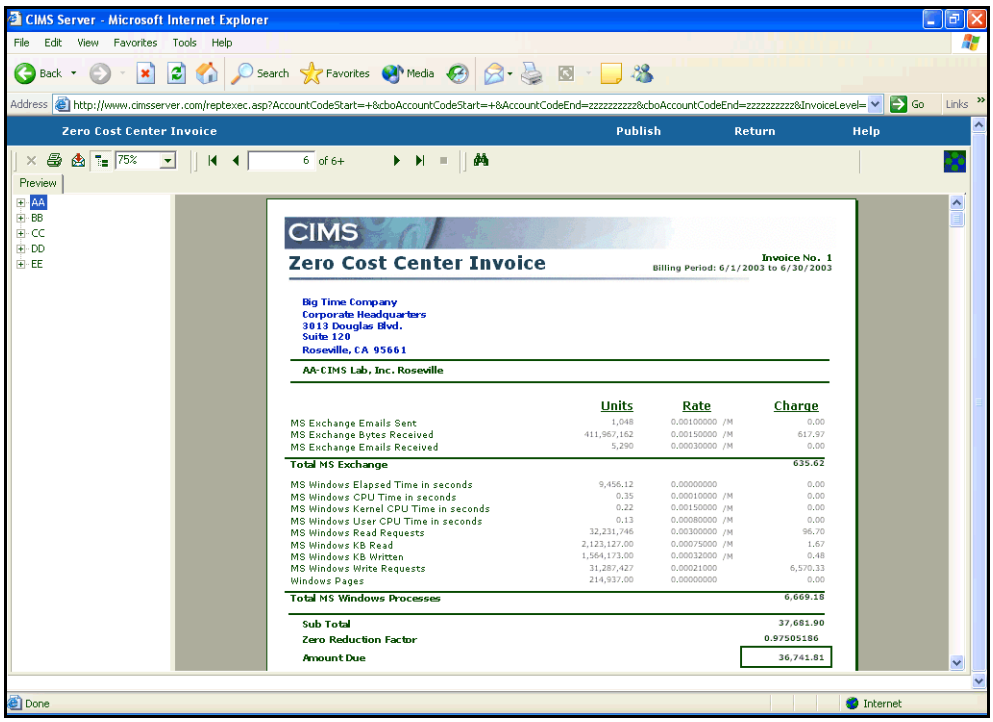


Figure A-35 • Zero Cost Center Invoice—Factor Total Report Example

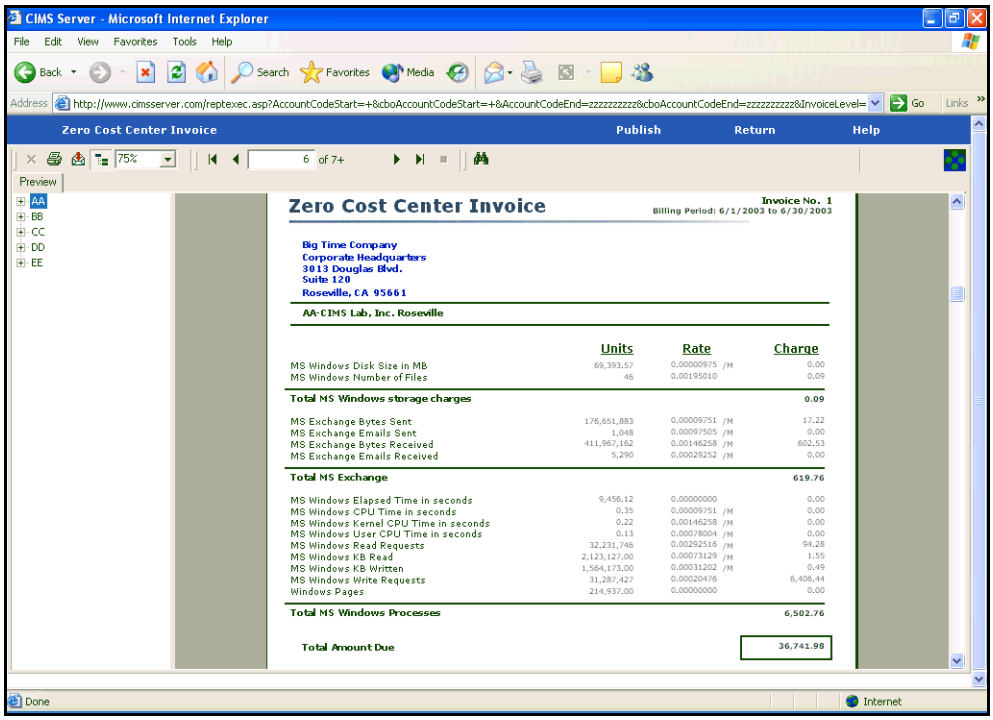


Figure A-36 • Zero Cost Center Invoice—Factor Rates Report Example

Zero Cost Center Factor Report

File name: RIVZC002.rpt

Stored Procedure: None

This report appears as the first report in the Zero Cost Center Invoice (see page A-55); however, you can also run this report independently. The last page of this report provides the zero factor difference between the total amount due for all account codes and the zero cost amount.

Drill down:

- Double-click a rate code description or its units, rate or charge and a breakdown of charges by account code appears.

Parameters:

- Starting and Ending Account Code
- From and To Date
- Zero Cost Amount

Report Example

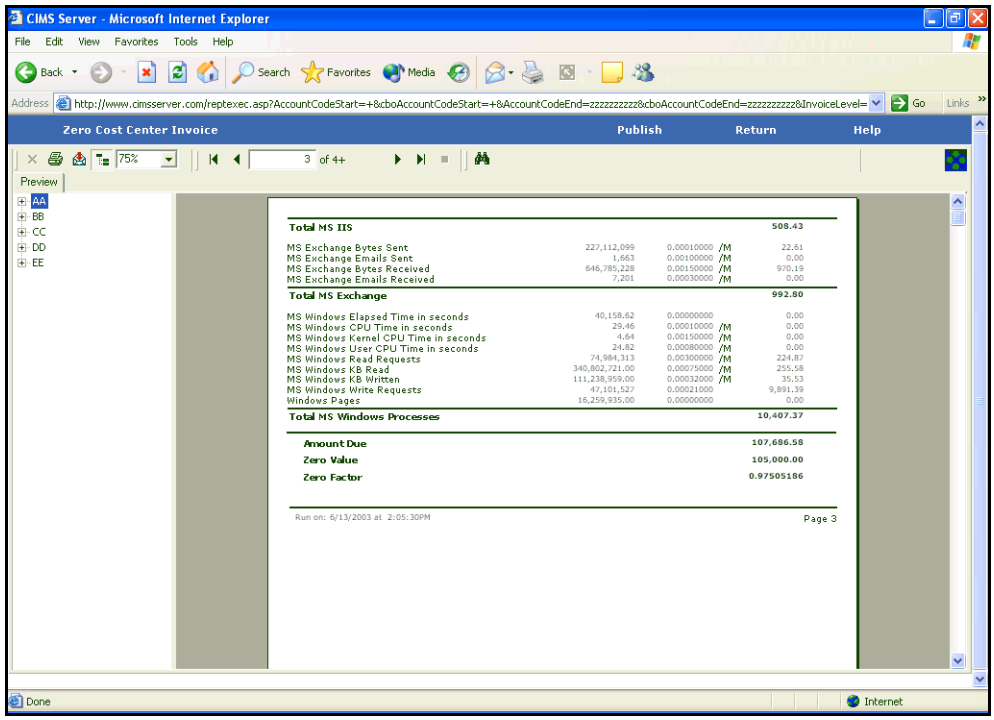


Figure A-37 • Zero Cost Center Factor Report Example

Job Cost Report

File name: `RJOBC001.rpt`

Stored Procedure: `CIMSSP_JobCost`

This report provides costs by job name. Rather than using costs from CIMSSummary table, this report calculates costs directly using rate code values and options (rate shifts, resource conversion, etc.) from the CIMSRate table.

The following is a description of each of the columns in this report:

Job Name	`Jobname` identifier value.
Sub–ID	`Work ID` identifier value.
Account	Account code.
Jobs	Number of jobs.
CPU Cost	Cost for rate code Z003 (Mainframe CPU Minutes) + Z020 (TSO CPU Minutes).
Tape I/O Cost	Cost for rate code Z007 (Tape SIOs).
Disk I/O Cost	Cost for rate code Z006 (Disk SIOs).
Other I/O Cost	Cost for rate code Z021 (TSO Inputs) + Z022 (TSO Outputs).
Input Data Cost	Cost for rate code Z014 (Input Records).
Print Cost	Cost for rate code Z016 (Lines Printed—Local) + Z017 (Pages Printed—Local) + Z018 (Print Time Minutes—Local).
Job Cost	Sum of preceding cost columns: CPU Cost through Print Cost.

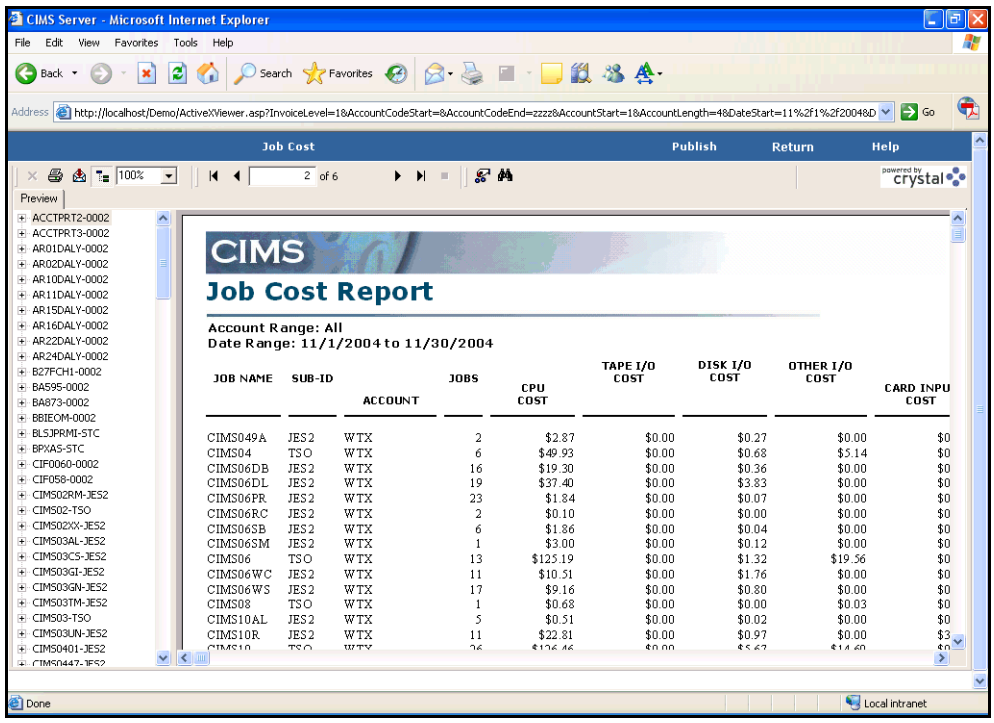
Drill down:

- Click any item in a line and a breakdown of for all items in the line appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example



Job Cost Report Example

MS SQL Server 2000 Resource Report

File name: RMS2R001.rpt

Stored Procedure: CIMSSP_Detail_Resource

This report provides SQL Server 200 trace file data for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

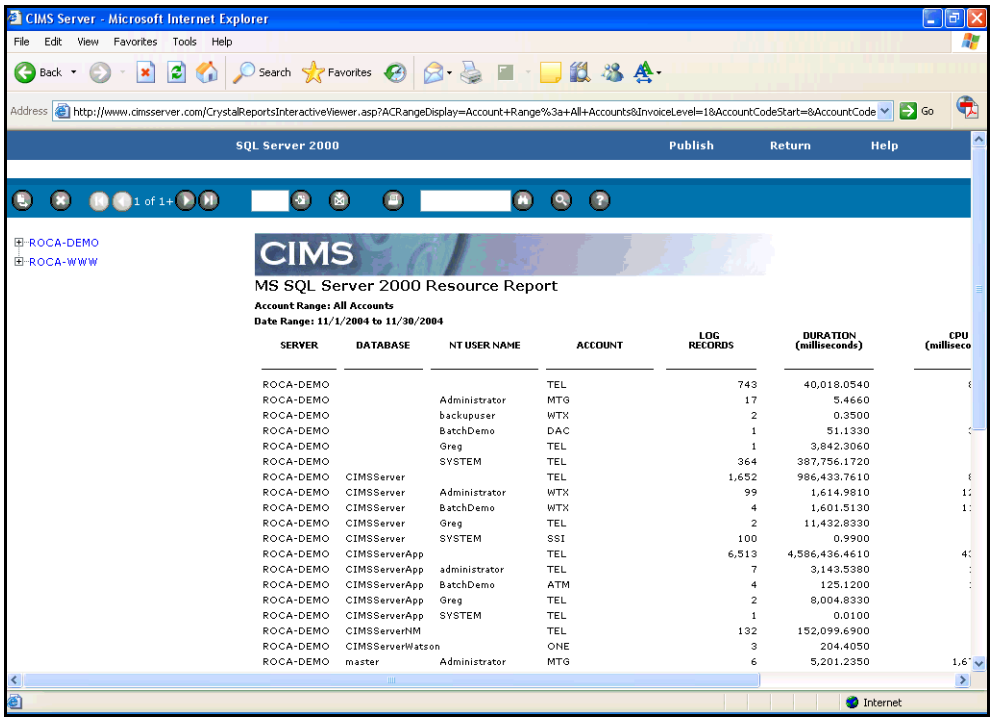


Figure A-38 • MS SQL Server 2000 Resource Report Example

Percentage Report

File name: RPERX001.rpt

Stored Procedure: CIMSSP_Summary

This report provides the total charge by account code for the parameters selected and specifies the percentage of that charge in relationship to the total charges for all account codes. This report also provides a breakdown of the percentage by rate group and rate code description for each account code.

Drill down:

- Double-click an account code and a breakdown of percentage by rate group appears. Double-click a rate group and a breakdown of percentage by rate code description appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

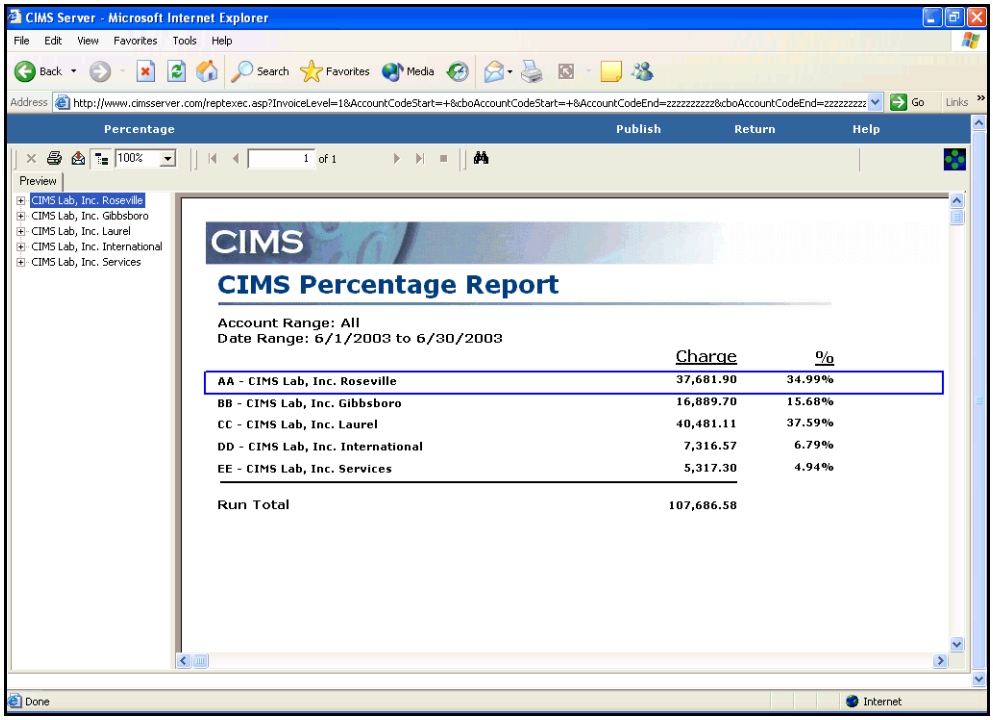


Figure A-39 • Percentage Report Example

Rate Report

File name: RRATX001.rpt

Stored procedure: None

This report provides the information contained in the CIMS Rate and Rate Group tables.

Drill down: None

Parameters: None

Report Example

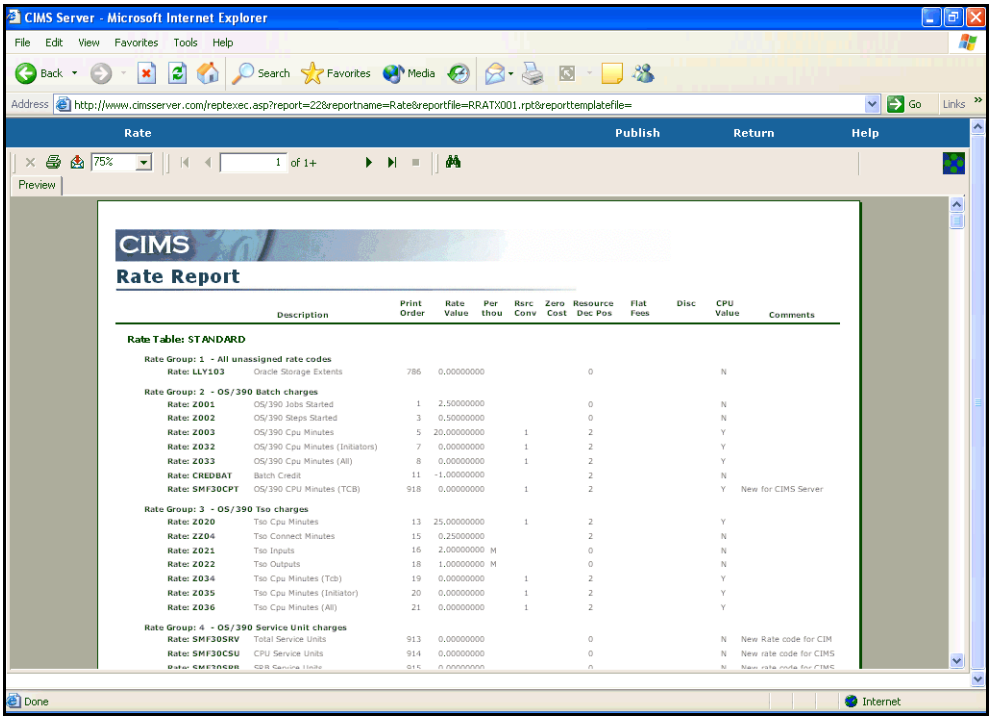


Figure A-40 • Rate Report Example

Top Cost Report

File name: RTOPC001.rpt

Stored Procedure: CIMSSP_Summary

This report provides the account codes with the highest charges for the parameters selected. For example, if you type 3 as the TopN parameter, the three account codes with the highest charges appear (see example Figure A-41 on page A-64). If you leave the TopN parameter blank, the account codes with the ten highest charges appear.

Drill down:

- Click the **Invoice** link and a complete invoice for the account code level appears (see *Invoice Report* on page A-43).
- Double-click an account code or its corresponding percent or charge and a breakdown of charges by rate group appears.

Parameters:

- TopN
- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

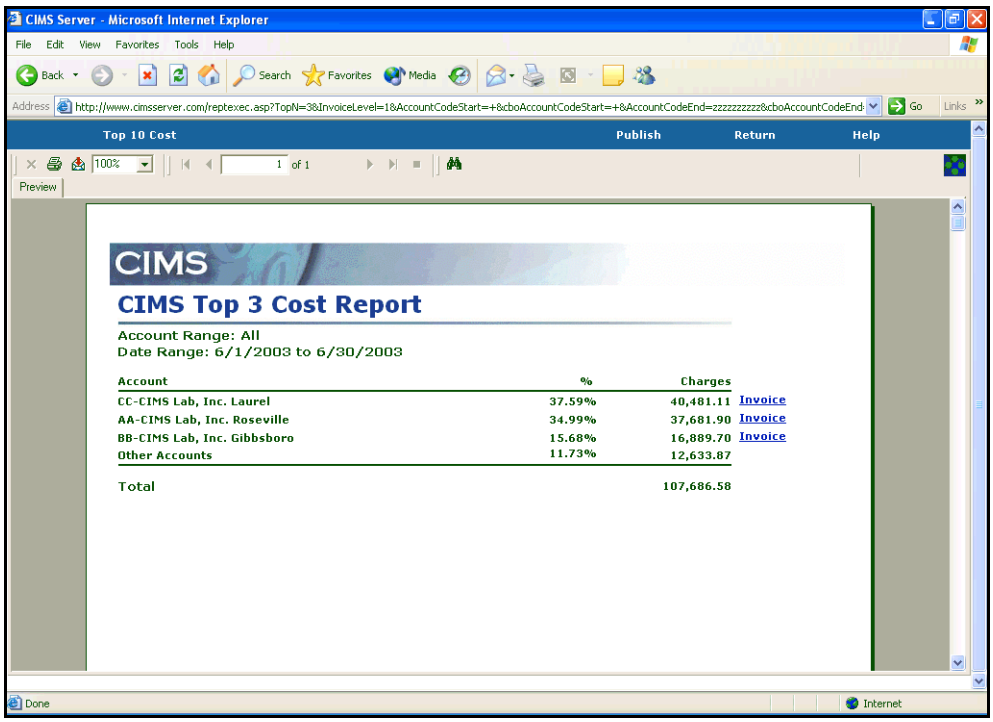


Figure A-41 • Top Cost Report Example

Top 10 Bar Graph Report

File name: `RTOPC002.rpt`

Stored Procedure: `CIMSSP_Summary`

This report is similar to the Top Cost Report (see page A-63). However, it provides accounts codes with the 10 highest charges for the parameters selected and it provides the data in bar graph as well as table format.

Drill down:

- Click the **Invoice** link and a complete invoice for the account code level appears (see *Invoice Report* on page A-43).
- Double-click an account code or its corresponding percent or charge and a breakdown of charges by rate code description appears in both bar graph and table format.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

Note • In the following example, there are only five account codes for the account code level selected.

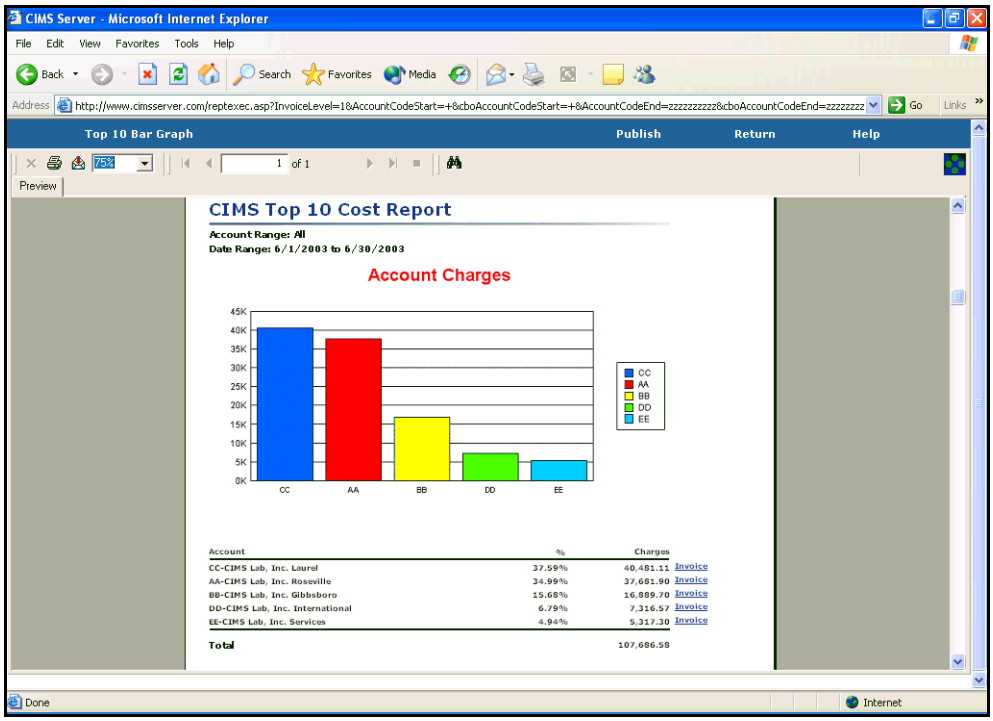


Figure A-42 • Top 10 Bar Graph Report Example

Top 10 Pie Chart Report

File name: RTOPC003.rpt

Stored Procedure: CIMSSP_Summary

This report is similar to the Top Cost Report (see page A-63). However, it provides accounts codes with the 10 highest charges for the parameters selected and it provides the data in pie chart as well as table format.

Drill down:

- Click the **Invoice** link and a complete invoice for the account code level appears (see *Invoice Report* on page A-43).
- Double-click an account code or its corresponding percent or charge and a breakdown of charges by rate code description appears in both pie chart and table format.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

Note • In the following example, there are only five account codes for the account code level selected.

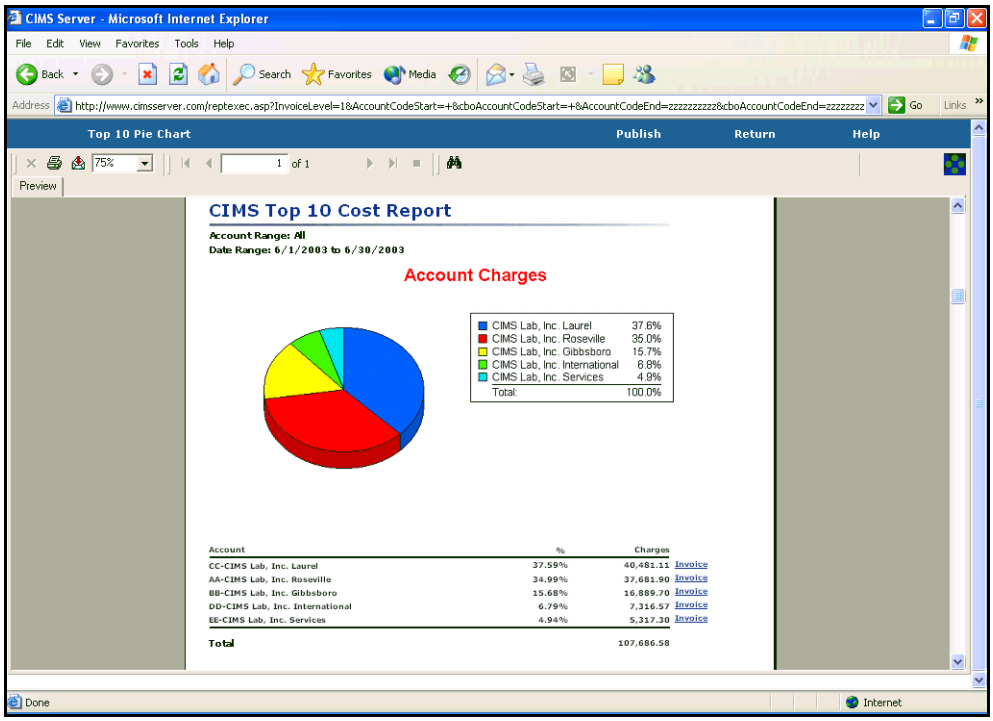


Figure A-43 • Top 10 Pie Chart Report Example

Top Accounts for Rate Report

File name: RTOPC004.rpt

Stored Procedure: CIMSSP_Summary

This report provides the account codes with the highest usage of a specified rate code for the parameters selected. For example, if you type 3 as the TopN parameter, the three account codes with the highest rate code usage appear (see example Figure A-44 on page A-69). If you leave the TopN parameter blank, the account codes with the ten highest rate code usage appear.

Drill down: None

Parameters:

- TopN
- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Code

Report Example

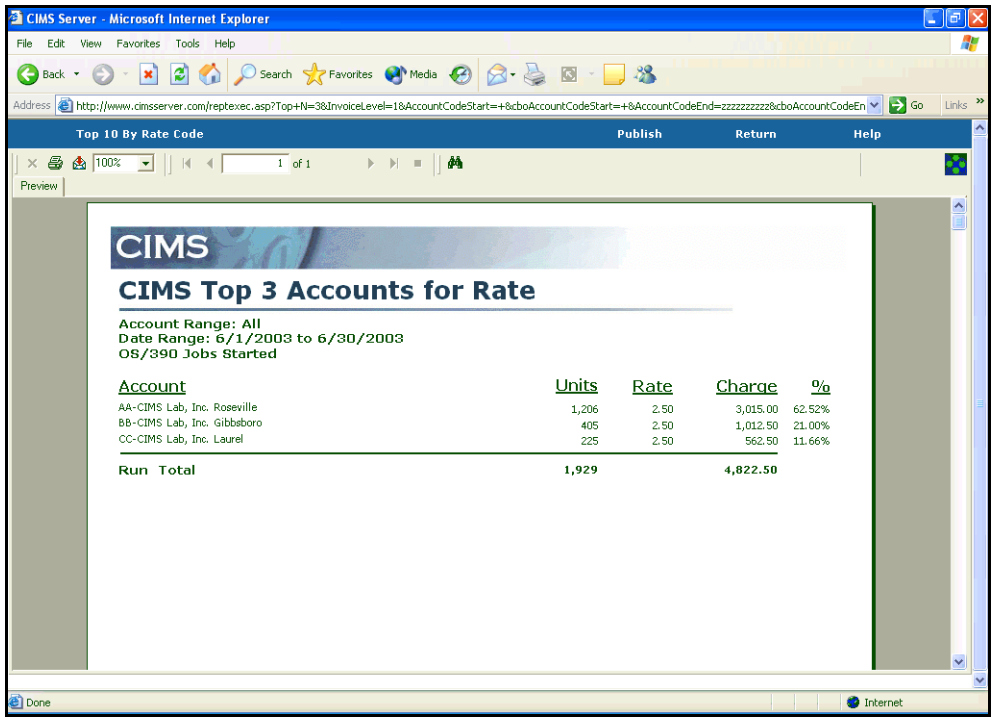


Figure A-44 • Top Accounts for Rate Report Example

Cost Trend Report

File name: RTRDC001.rpt

Stored Procedure: CIMSSP_Summary_Month

This report provides total charges by account code for each month of the year for the parameters selected. Monthly charges for each account code are presented on a single line.

Note • To print this report, use landscape mode on legal paper.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example

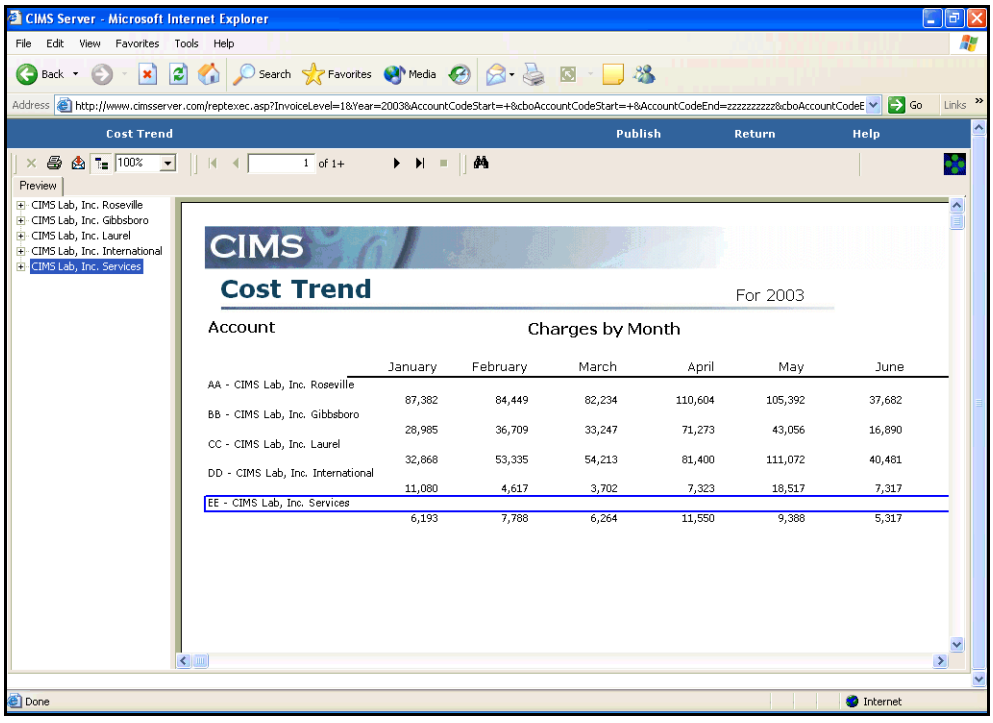


Figure A-45 • Cost Trend Report Example

Cost Trend by Rate Report

File name: RTRDC002.rpt

Stored Procedure: CIMSSP_Summary_Month

This report provides total charges by rate code description and rate group for each month of the year for the parameters selected.

Note • To print this report, use landscape mode on legal paper.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example

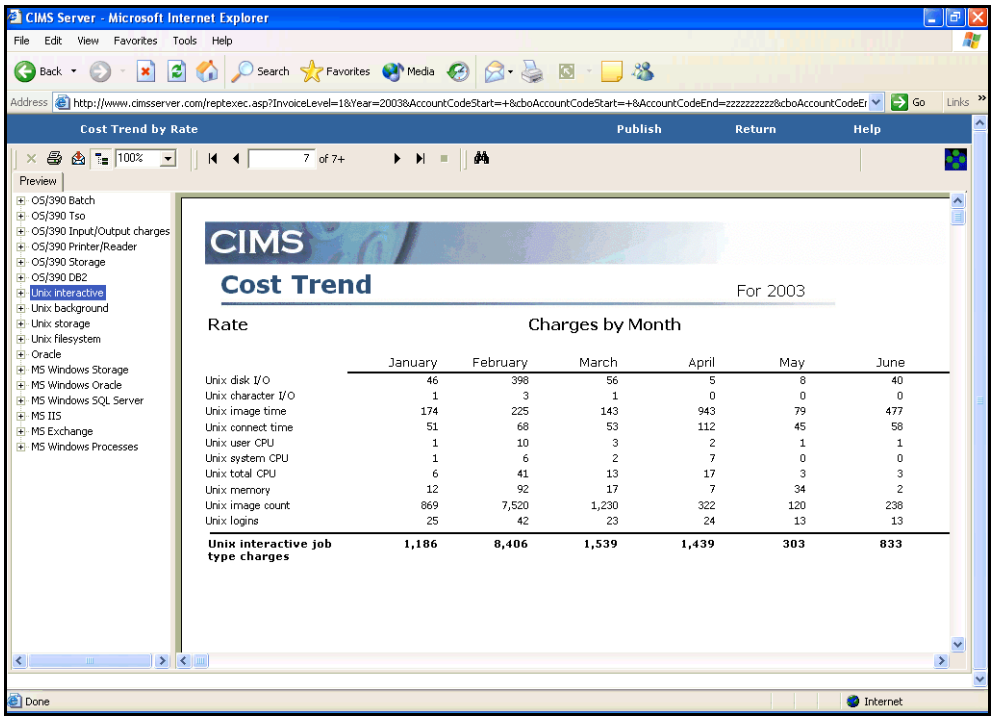


Figure A-46 • Cost Trend by Rate Report Example

Resource Usage Trend Report

File name: RTRDR001.rpt

Stored Procedure: CIMSSP_Summary_Month

This report provides total resource usage by rate code for each month of the year for the parameters selected. This report is ordered by account code, rate group, and rate code.

Note • To print this report, use landscape mode on legal paper.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example

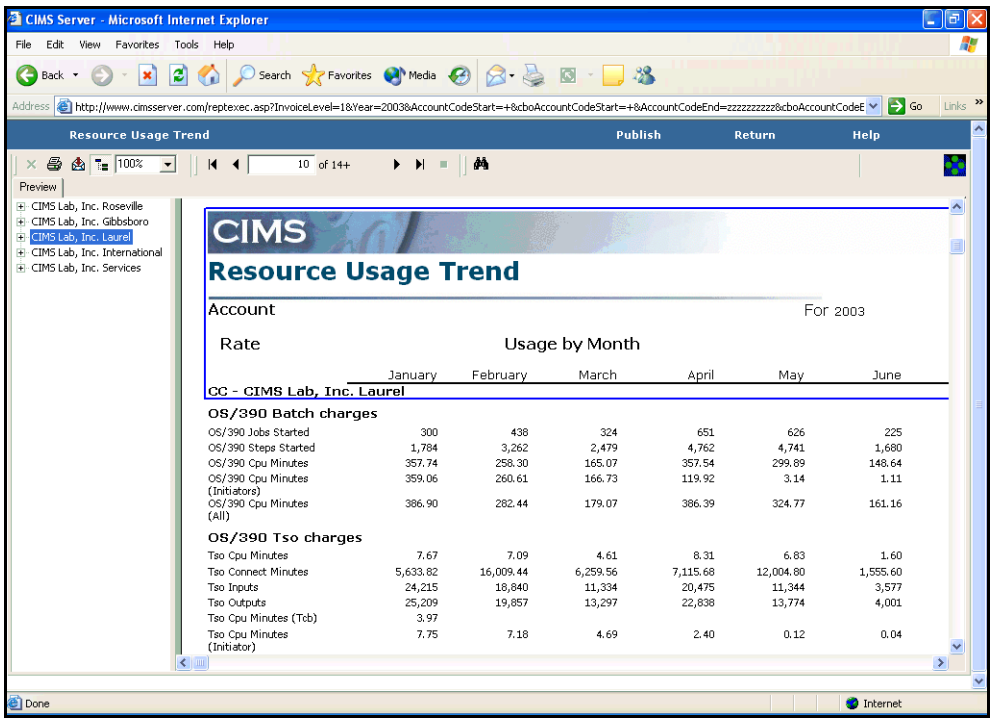


Figure A-47 • Resource Usage Trend Report Example

Transaction Report

File name: RTRNX001.rpt

Stored procedure: None

This report provides the Miscellaneous, Recurring and Credit, transactions for the parameters selected. For more information about transactions, see *Chapter 6, Using Transactions*.

Drill down: None

Parameters:

- Transaction Type
- Starting and Ending Account Code
- From and To Date

Report Example

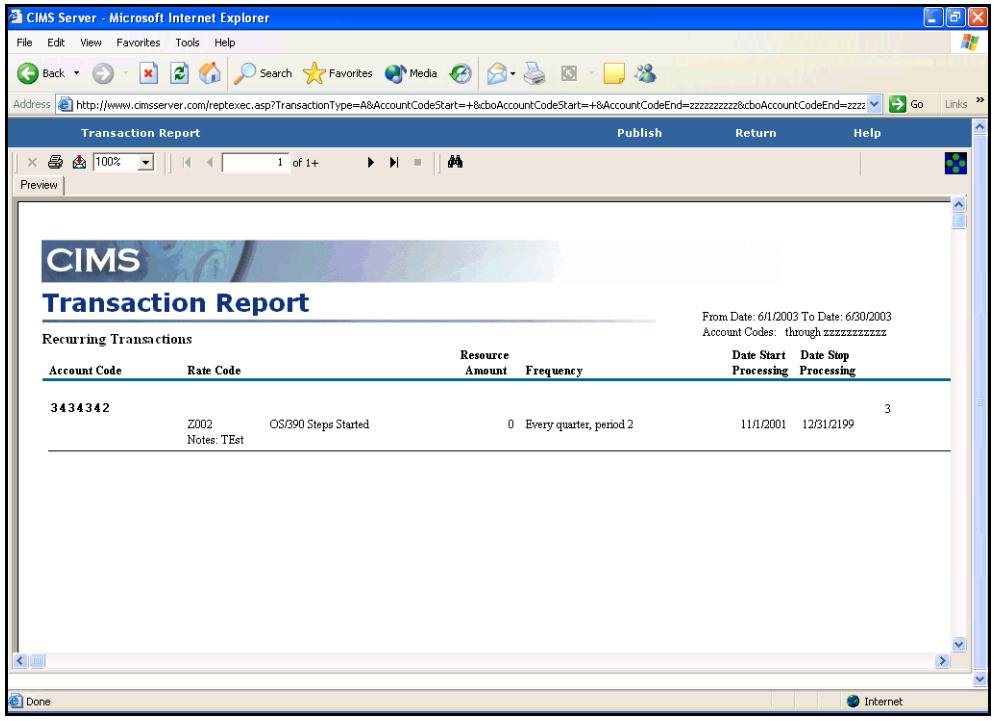


Figure A-48 • Transaction Report Example

Cost Variance Report

File name: `RVARC001.rpt`

Stored Procedure: `CIMSSP_Variance`

This report provides a comparison of charges by account code, rate code description, and rate group for a specified month and the month prior for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Month
- Report Year
- Starting and Ending Account Code

Report Example

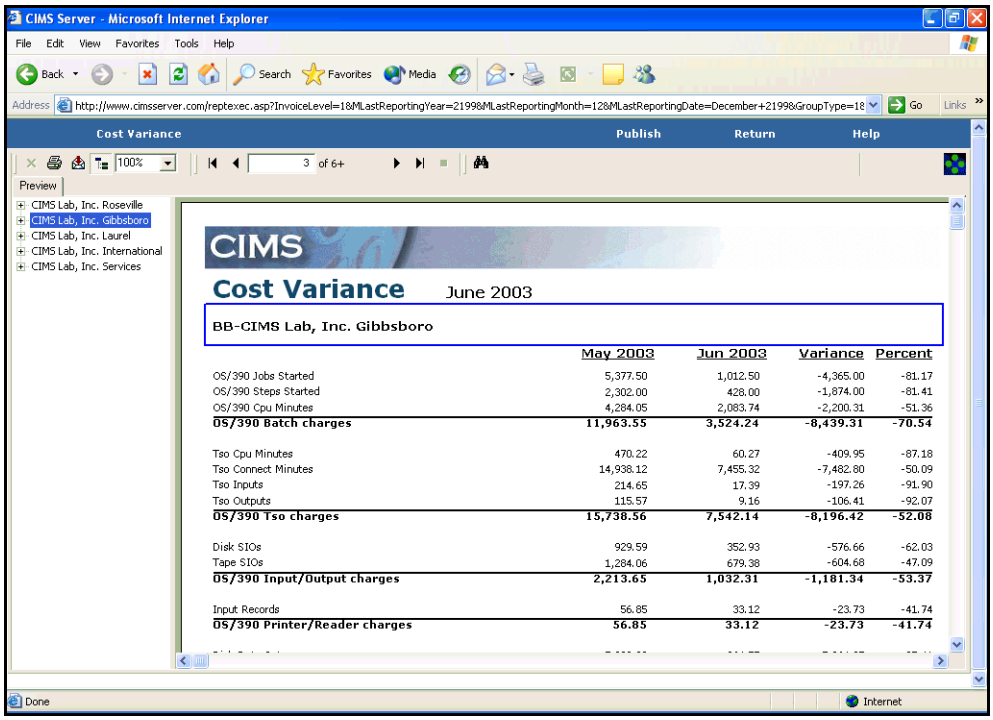


Figure A-49 • Cost Variance Report Example

Cost Variance Drill Down Report

File name: `RVARC002.rpt`

Stored Procedure: `CIMSSP_Variance`

This report provides a comparison of charges by rate code description and rate group for a specified month and the month prior for the parameters selected.

Drill down:

- Double-click a rate code description or its corresponding monthly totals, variance, or percent and a breakdown of data by account code appears.

Parameters:

- Account Code Level
- Report Year
- Report Month
- Starting and Ending Account Code

Report Example

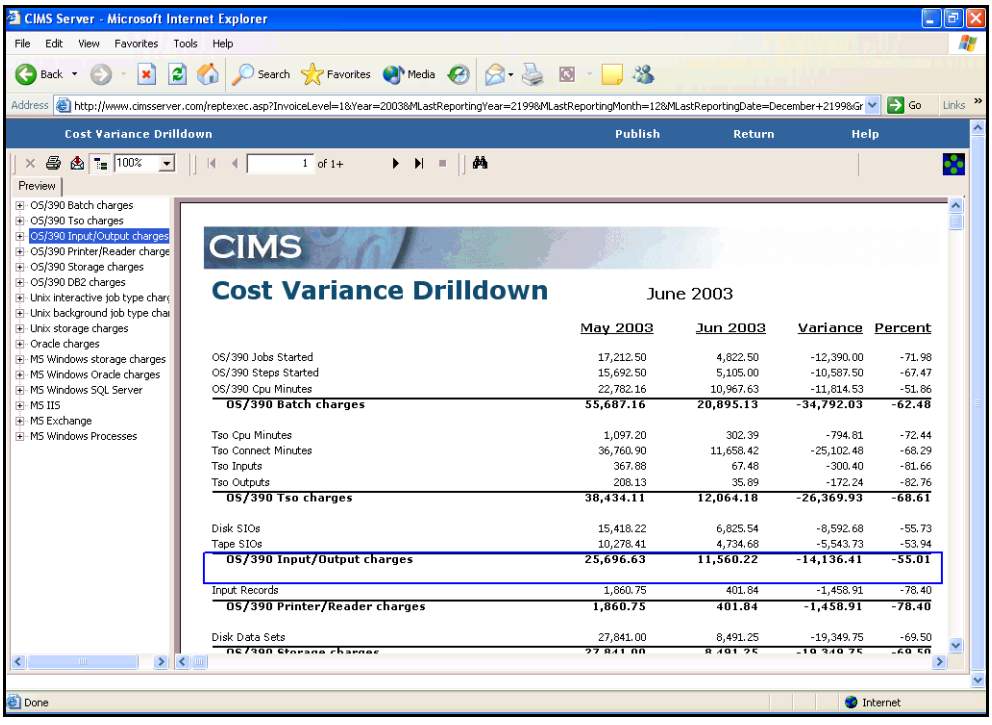


Figure A-50 • Cost Variance Drill Down Report Example

Resource Variance Report

File name: RVARR001.rpt

Stored Procedure: CIMSSP_Variance

This report provides a comparison of resource usage by account code, rate group, and rate code description for a specified month and the month prior for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Report Month
- Starting and Ending Account Code

Report Example

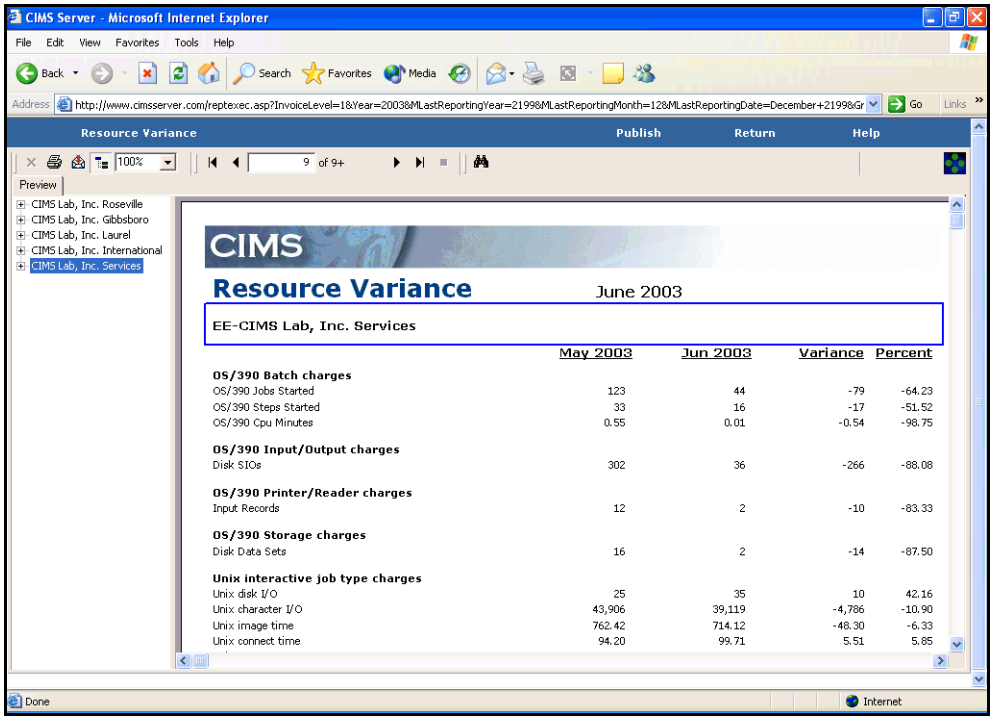


Figure A-51 • Resource Variance Report Example

Disk Directory Resource Report

File name: RWDKR001.rpt

Stored Procedure: CIMSSP_Detail_Resource

This report provides windows disk storage data for the parameters selected. This data is taken from the CIMSDetail table.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

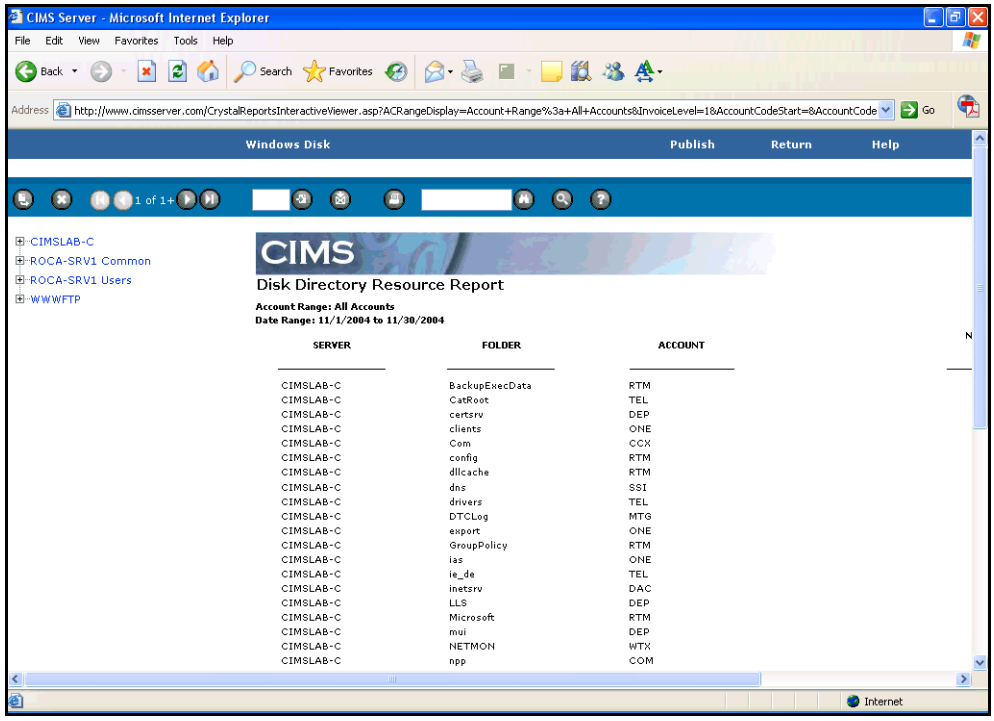


Figure A-52 • Disk Directory Resource Report Example

Account Summary by Week Report

File name: RWEKC001.rpt

Stored Procedure: CIMSSP_Summary_Day

This report provides the total weekly and monthly charges by account code and rate code description for the parameters selected.

Drill down:

- Double-click the charge for a week and a breakdown of charges by rate code description appears.

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

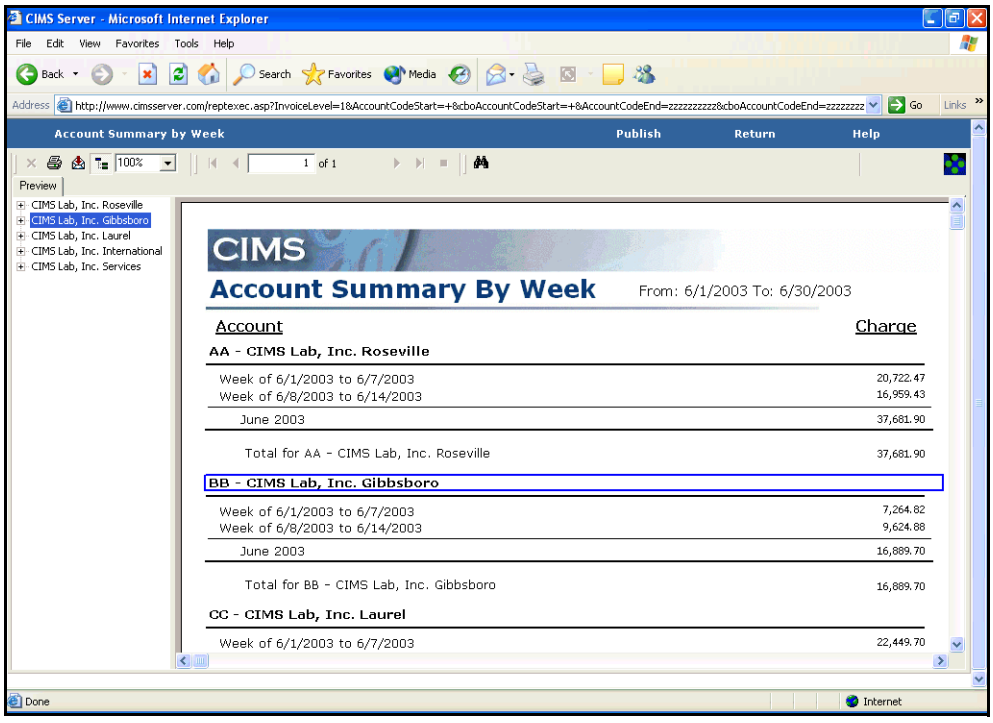


Figure A-53 • Account Summary by Week Report Example

Account Summary by Week–Wide Report

File name: RWEKC002.rpt

Stored Procedure: CIMSSP_Summary_Day

This report is similar to the Account Summary by Week report (see page A-78). However, the weeks are displayed across the top of the page.

Drill down:

- Double-click an account code and a weekly breakdown of charges by rate code description appears.

Parameters:

- Account Code Level
- Report Year
- Report Month
- Starting and Ending Account Code

Report Example

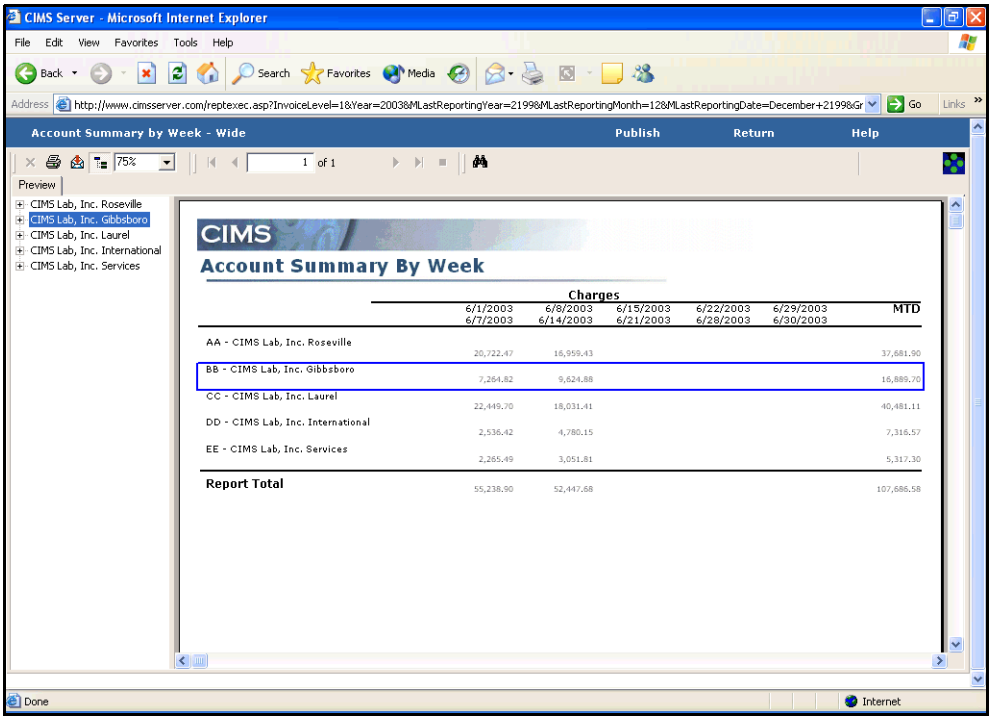


Figure A-54 • Account Summary by Week–Wide Report Example

Account Summary YTD Report

File name: RYTDC001.rpt

Stored Procedure: CIMSSP_Summary_Month

This report provides the total monthly and YTD charges by account code, rate group, and rate code description for the parameters selected.

Drill down:

- Double-click a month or the charge for a month and a breakdown of charges by rate group appears. Double-click a rate group and a breakdown of charges by rate code description appears.

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example

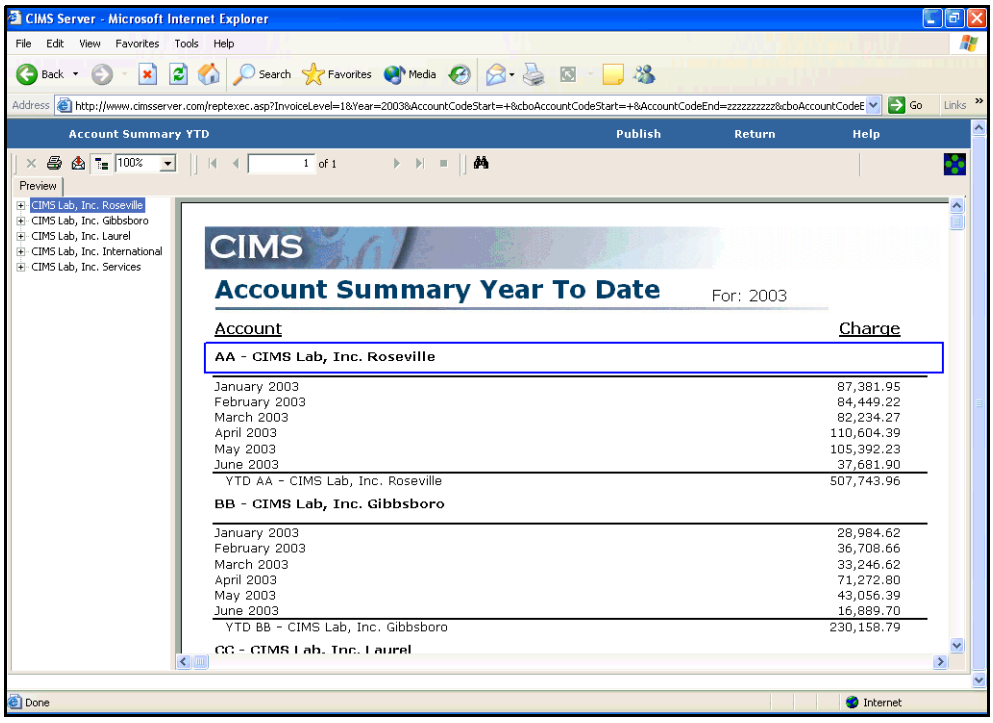


Figure A-55 • Account Summary YTD Report Example

Account Summary YTD–Wide Report

File name: RYTDC002.rpt

Stored Procedure: CIMSSP_Summary_Month

This report is similar to the Account Summary YTD report (see page A-80). However, the months are displayed across the top of the page.

Drill down:

- Double-click an account code and a monthly breakdown of charges by rate code description appears.

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example

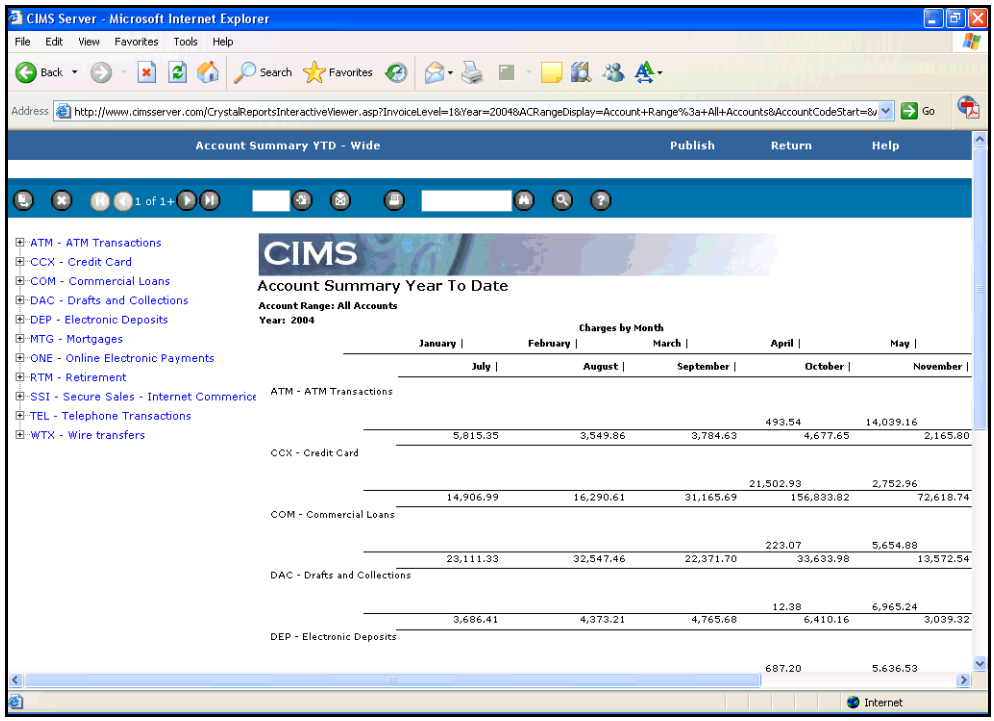


Figure A-56 • Account Summary YTD–Wide Report Example

Spreadsheets

This section describes the CIMS Server spreadsheets. When you run a spreadsheet, CIMS Server Web Reporting presents the report data in Microsoft Excel. In addition to viewing the report in the Web browser, you can also save the spreadsheet as an Excel or other file or publish the report for all users. For more information, see *Working With Spreadsheets* on page 3-9. You must have Excel installed on the client running the spreadsheet.

Invoice Spreadsheet

File name: `SINVC001.rpt`

Stored Procedure: None

This spreadsheet provides invoice information for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

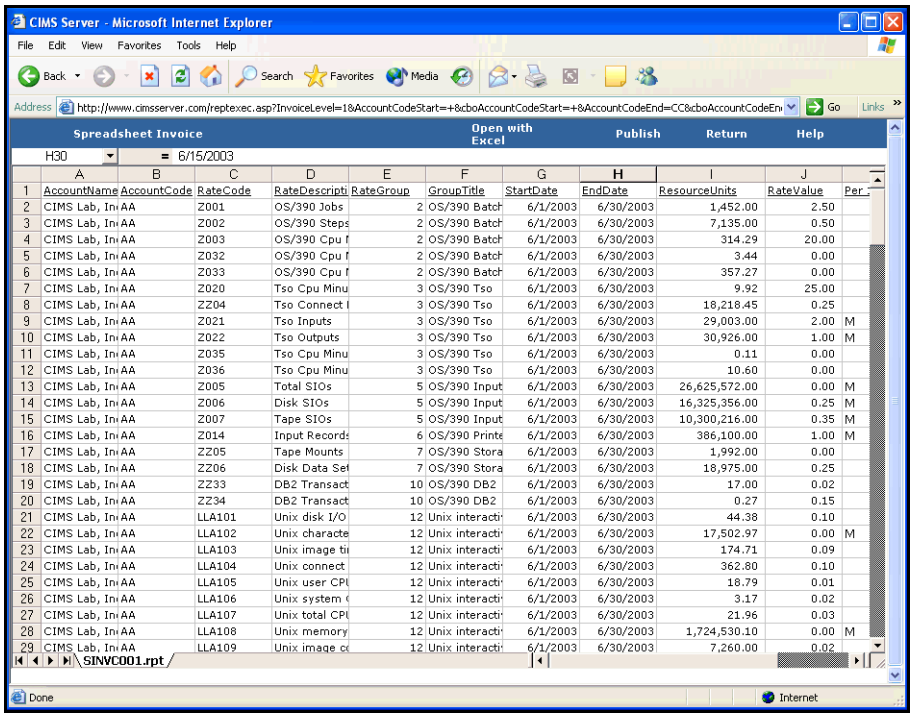


Figure A-57 • Invoice Spreadsheet Example

Run Total Invoice Spreadsheet

File name: SINVC002.rpt

Stored Procedure: None

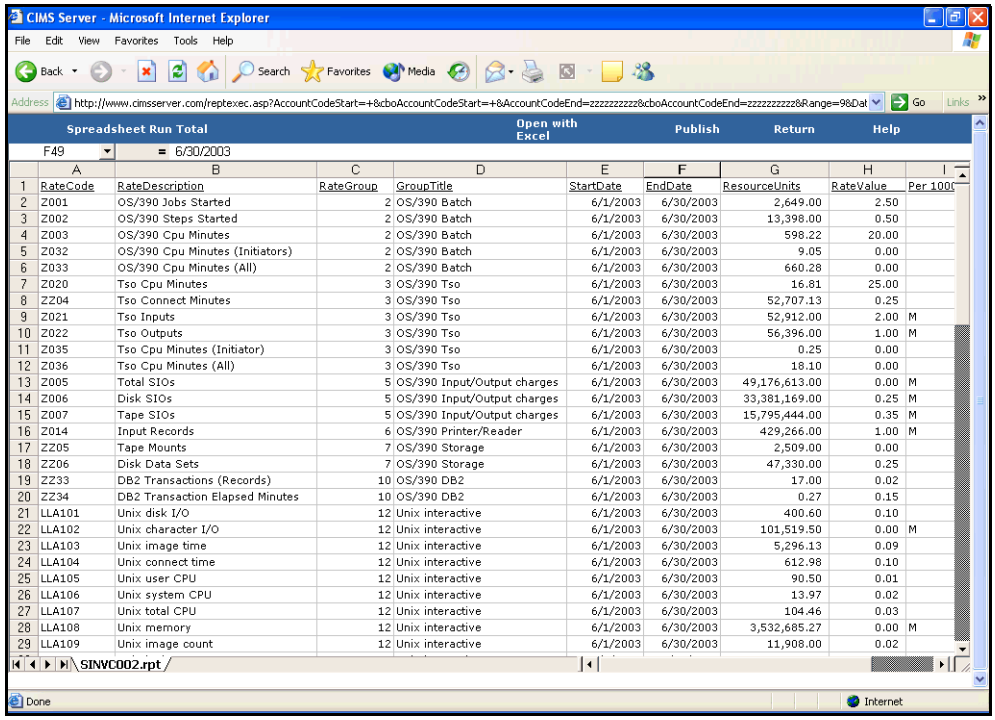
This spreadsheet provides total invoice information by rate code for the parameters selected.

Drill down: None

Parameters:

- Starting and Ending Account Code
- From and To Date

Report Example



	A	B	C	D	E	F	G	H	I
1	RateCode	RateDescription	RateGroup	GroupTitle	StartDate	EndDate	ResourceUnits	RateValue	Per 100
2	Z001	OS/390 Jobs Started	2	OS/390 Batch	6/1/2003	6/30/2003	2,649.00	2.50	
3	Z002	OS/390 Steps Started	2	OS/390 Batch	6/1/2003	6/30/2003	13,398.00	0.50	
4	Z003	OS/390 Cpu Minutes	2	OS/390 Batch	6/1/2003	6/30/2003	598.22	20.00	
5	Z032	OS/390 Cpu Minutes (Initiators)	2	OS/390 Batch	6/1/2003	6/30/2003	9.05	0.00	
6	Z033	OS/390 Cpu Minutes (All)	2	OS/390 Batch	6/1/2003	6/30/2003	660.28	0.00	
7	Z020	Tso Cpu Minutes	3	OS/390 Tso	6/1/2003	6/30/2003	16.81	25.00	
8	ZZ04	Tso Connect Minutes	3	OS/390 Tso	6/1/2003	6/30/2003	52,707.13	0.25	
9	Z021	Tso Inputs	3	OS/390 Tso	6/1/2003	6/30/2003	52,912.00	2.00	M
10	Z022	Tso Outputs	3	OS/390 Tso	6/1/2003	6/30/2003	56,396.00	1.00	M
11	Z035	Tso Cpu Minutes (Initiator)	3	OS/390 Tso	6/1/2003	6/30/2003	0.25	0.00	
12	Z036	Tso Cpu Minutes (All)	3	OS/390 Tso	6/1/2003	6/30/2003	18.10	0.00	
13	Z005	Total SIOs	5	OS/390 Input/Output charges	6/1/2003	6/30/2003	49,176,613.00	0.00	M
14	Z006	Disk SIOs	5	OS/390 Input/Output charges	6/1/2003	6/30/2003	33,381,169.00	0.25	M
15	Z007	Tape SIOs	5	OS/390 Input/Output charges	6/1/2003	6/30/2003	15,795,444.00	0.35	M
16	Z014	Input Records	6	OS/390 Printer/Reader	6/1/2003	6/30/2003	429,266.00	1.00	M
17	ZZ05	Tape Mounts	7	OS/390 Storage	6/1/2003	6/30/2003	2,509.00	0.00	
18	ZZ06	Disk Data Sets	7	OS/390 Storage	6/1/2003	6/30/2003	47,330.00	0.25	
19	ZZ33	DB2 Transactions (Records)	10	OS/390 DB2	6/1/2003	6/30/2003	17.00	0.02	
20	ZZ34	DB2 Transaction Elapsed Minutes	10	OS/390 DB2	6/1/2003	6/30/2003	0.27	0.15	
21	LLA101	Unix disk I/O	12	Unix interactive	6/1/2003	6/30/2003	400.60	0.10	
22	LLA102	Unix character I/O	12	Unix interactive	6/1/2003	6/30/2003	101,519.50	0.00	M
23	LLA103	Unix image time	12	Unix interactive	6/1/2003	6/30/2003	5,296.13	0.09	
24	LLA104	Unix connect time	12	Unix interactive	6/1/2003	6/30/2003	612.98	0.10	
25	LLA105	Unix user CPU	12	Unix interactive	6/1/2003	6/30/2003	90.50	0.01	
26	LLA106	Unix system CPU	12	Unix interactive	6/1/2003	6/30/2003	13.97	0.02	
27	LLA107	Unix total CPU	12	Unix interactive	6/1/2003	6/30/2003	104.46	0.03	
28	LLA108	Unix memory	12	Unix interactive	6/1/2003	6/30/2003	3,532,685.27	0.00	M
29	LLA109	Unix image count	12	Unix interactive	6/1/2003	6/30/2003	11,908.00	0.02	

Figure A-58 • Run Total Invoice Spreadsheet Example

Invoice by Rate Group Spreadsheet

File name: SINVC003.rpt

Stored Procedure: None

This spreadsheet provides invoice information for the rate codes within a selected rate group for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Group

Report Example

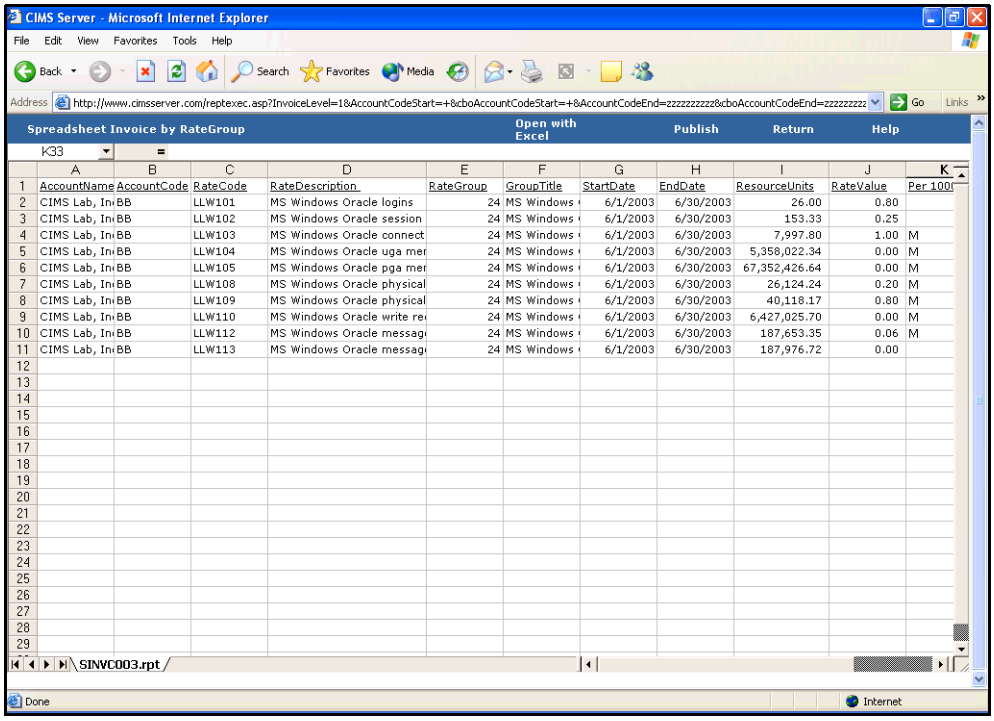


Figure A-59 • Invoice by Rate Group Spreadsheet Example

Invoice by Account Code Spreadsheet

File name: SINVC004.rpt

Stored Procedure: CIMSSP_Summary

This spreadsheet provides invoice information by account code for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

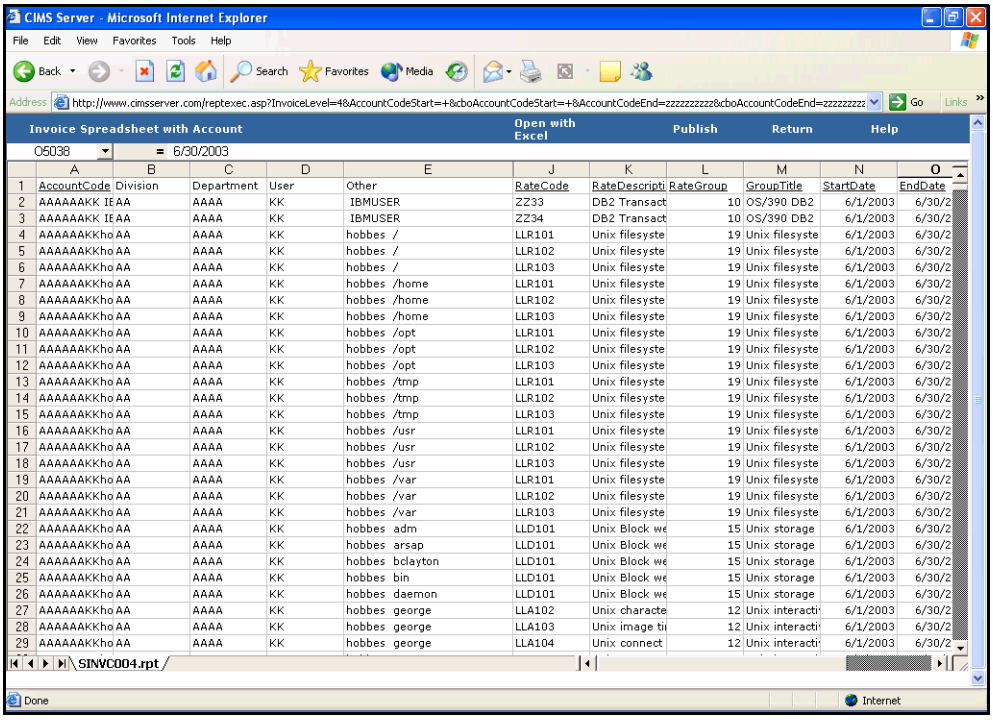


Figure A-60 • Invoice by Account Code Spreadsheet Example

Proration by Total Amount Spreadsheet

File name: SPERX001.rpt

Stored Procedure: CIMSSP_Summary

This spreadsheet enables you to prorate an amount that you enter as a parameter across account codes. The percentage prorated to each account is based on the total charge incurred by the account. That is, the higher the total charge for an account, the higher the percentage of the prorate amount that is assigned to that account.

Drill down: None

Parameters:

- Account Code Level
- Prorate
- Starting and Ending Account Code
- From and To Date

Report Example

In the following example, $100,000 is prorated across accounts for the parameters selected.

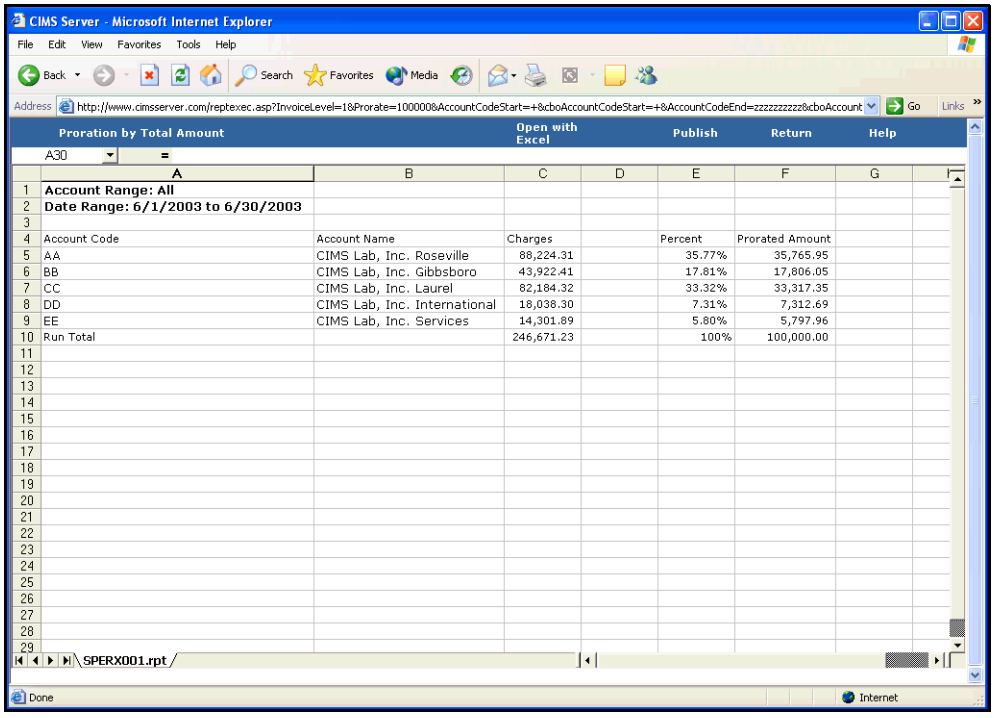


Figure A-61 • Proration by Total Amount Spreadsheet Example

Proration by Rate Code Spreadsheet

File name: SPERX002.rpt

Stored Procedure: CIMSSP_Summary_RateCode

This spreadsheet is similar to Proration by Total Amount report (see page A-87) except that the prorate amount is applied by account code to the rate code that you select.

Drill down: None

Parameters:

- Account Code Level
- Prorate
- Starting and Ending Account Code
- From and To Date
- Rate Code

Report Example

In the following example, $50,000 is prorated across accounts charged for the rate code Z006 for the parameters selected.

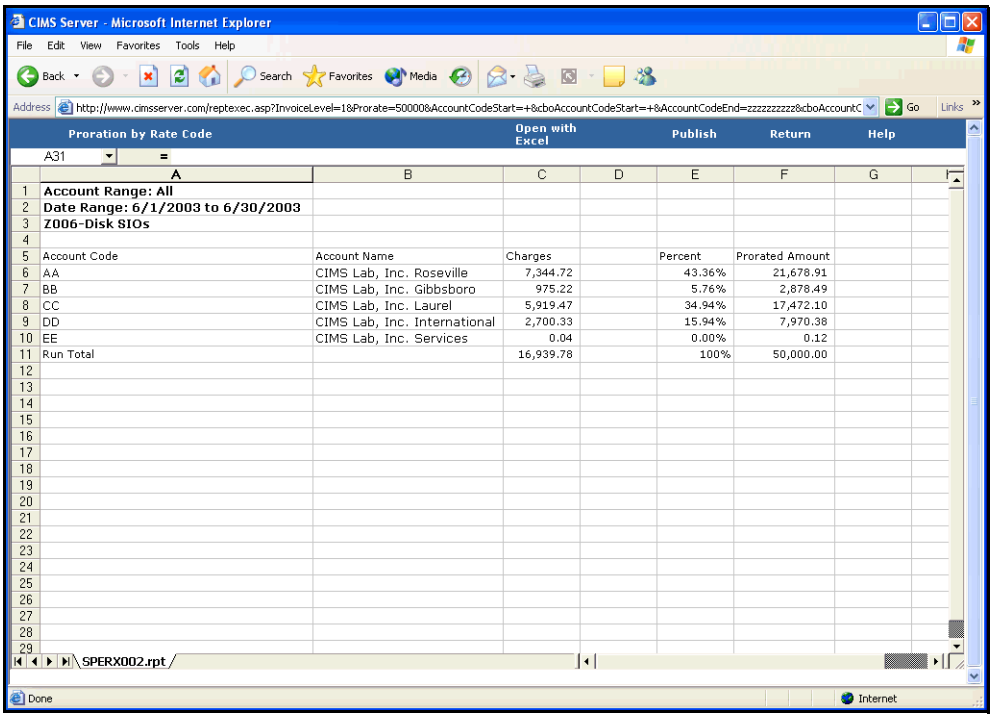


Figure A-62 • Proration by Rate Code Spreadsheet Example

Proration by Rate Group Spreadsheet

File name: SPERX003.rpt

Stored Procedure: CIMSSP_Summary_RateGroup

This spreadsheet is similar to Proration by Total Amount report (see page A-87) except that the prorate amount is applied by account code to the rate group that you select.

Drill down: None

Parameters:

- Account Code Level
- Prorate
- Starting and Ending Account Code
- From and To Date
- Rate Group

Report Example

In the following example, $30,000 is prorated across accounts charged for rate codes belonging to the rate group OS/390 Input/Output charges for the parameters selected.

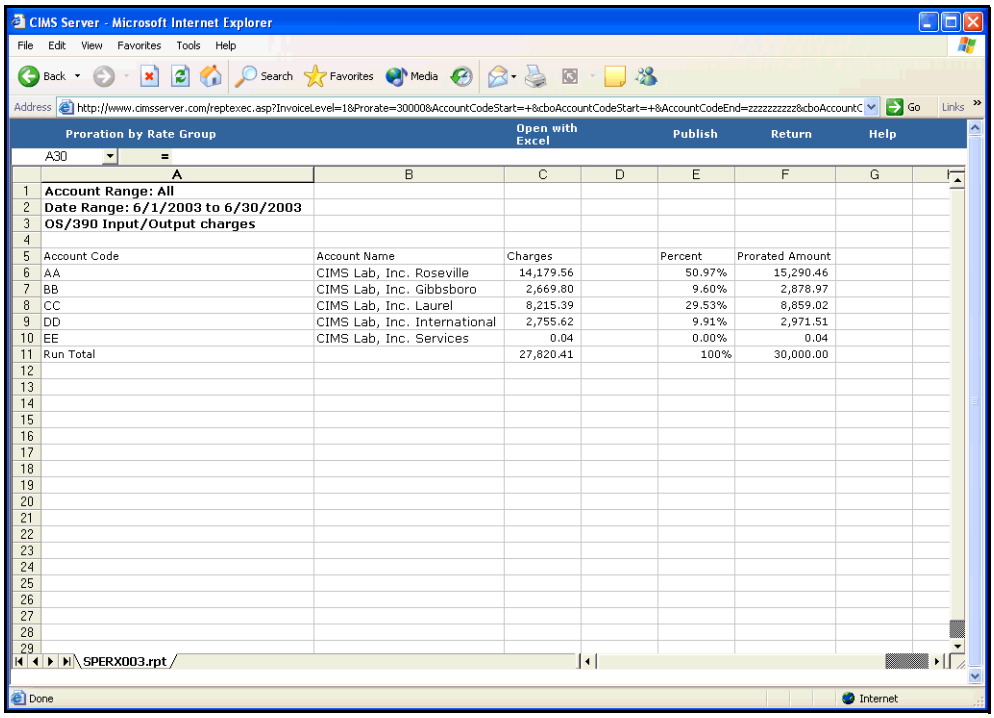


Figure A-63 • Proration by Rate Group Spreadsheet Example

Top 10 Accounts for Rate Spreadsheet

File name: STOPC004.rpt

Stored Procedure: CIMSSP_Summary_RateCode

This spreadsheet provides the account codes with the highest usage of a specified rate code for the parameters selected. For example, if you type 3 as the TopN parameter, the three account codes with the highest rate code usage appear (see example Figure A-64). If you leave the TopN parameter blank, the account codes with the ten highest rate code usage appear.

Drill down: None

Parameters:

- TopN
- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Code

Report Example

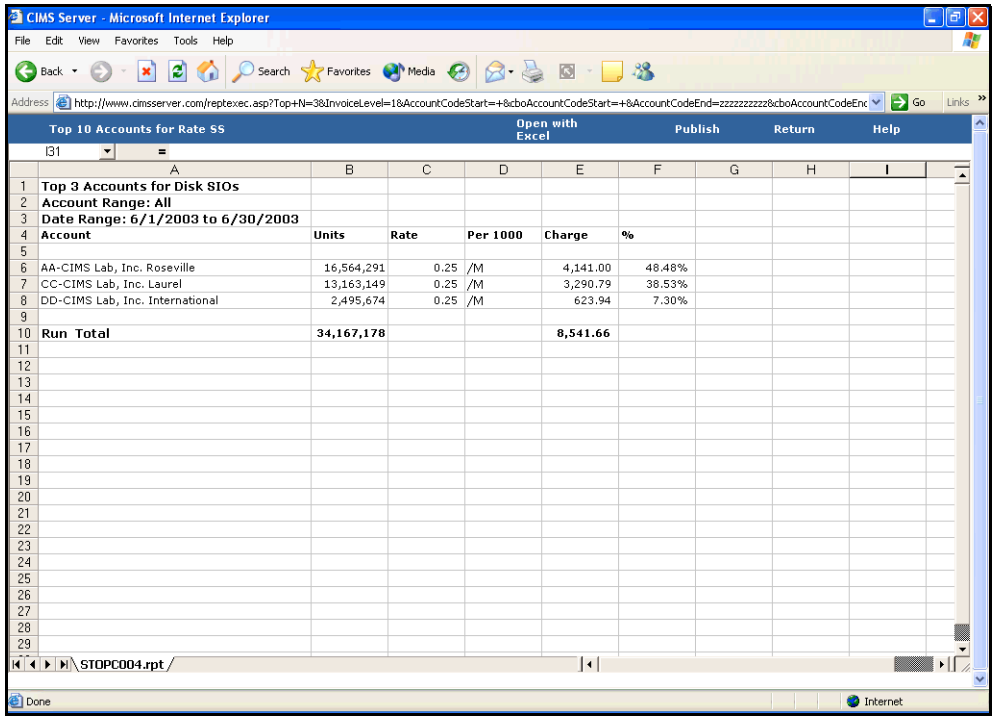


Figure A-64 • Top 10 Accounts for Rate Spreadsheet Example

Account Summary Week Spreadsheet

File name: SWEKC001.rpt

Stored Procedure: None

This spreadsheet provides account summary weekly information by account code for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Report Month
- Starting and Ending Account Code

Report Example

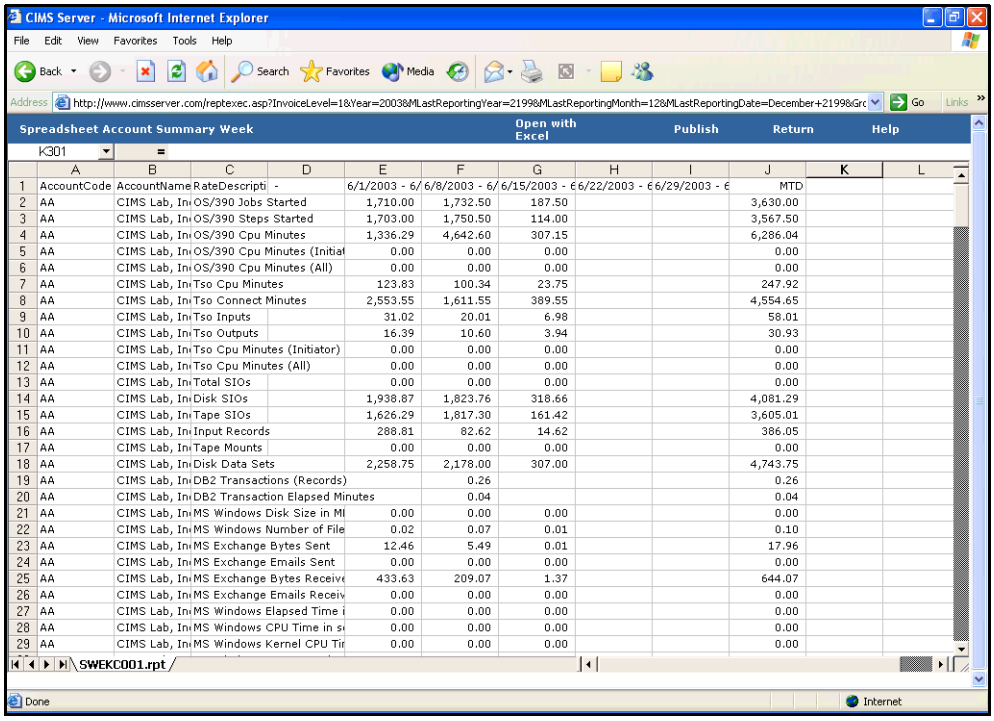


Figure A-65 • Account Summary Week Spreadsheet Example

Account Summary YTD Spreadsheet

File name: SYTDC001.rpt

Stored Procedure: None

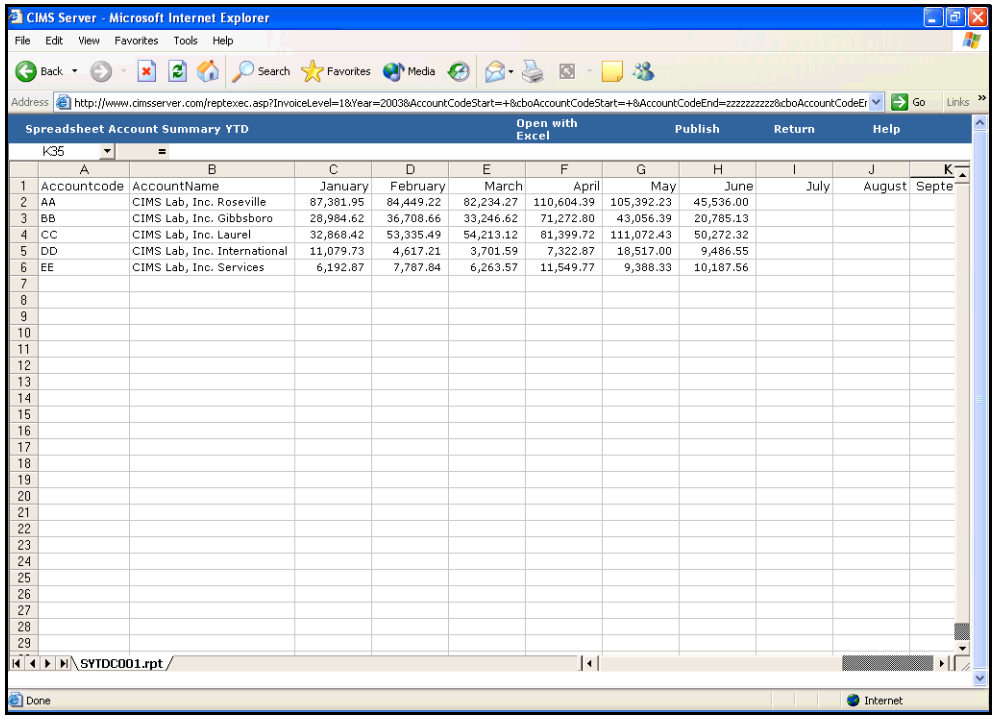
This spreadsheet provides account summary YTD information by account code for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example



	A	B	C	D	E	F	G	H	I	J	K
1	Accountcode	AccountName	January	February	March	April	May	June	July	August	Septe
2	AA	CIMS Lab, Inc. Roseville	87,381.95	84,449.22	82,234.27	110,604.39	105,392.23	45,536.00			
3	BB	CIMS Lab, Inc. Gibbsboro	28,984.62	36,708.66	33,246.62	71,272.80	43,056.39	20,785.13			
4	CC	CIMS Lab, Inc. Laurel	32,868.42	53,335.49	54,213.12	81,399.72	111,072.43	50,272.32			
5	DD	CIMS Lab, Inc. International	11,079.73	4,617.21	3,701.59	7,322.87	18,517.00	9,486.55			
6	EE	CIMS Lab, Inc. Services	6,192.87	7,787.84	6,263.57	11,549.77	9,388.33	10,187.56			

Figure A-66 • Account Summary YTD Spreadsheet Example

Account Summary YTD by Rate Spreadsheet

File name: SYTDC002.rpt

Stored Procedure. None

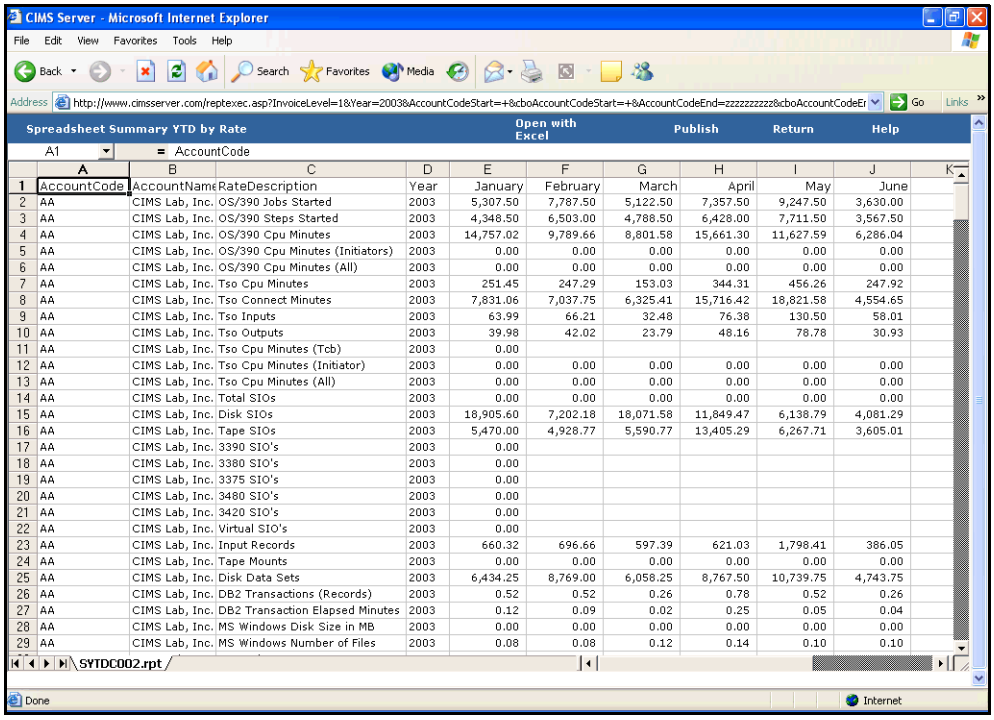
This spreadsheet provides account summary YTD information by rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code

Report Example



AccountCode	AccountName	RateDescription	Year	January	February	March	April	May	June
AA	CIMS Lab, Inc.	OS/390 Jobs Started	2003	5,307.50	7,787.50	5,122.50	7,357.50	9,247.50	3,630.00
AA	CIMS Lab, Inc.	OS/390 Steps Started	2003	4,348.50	6,503.00	4,788.50	6,428.00	7,711.50	3,567.50
AA	CIMS Lab, Inc.	OS/390 Cpu Minutes	2003	14,757.02	9,789.66	8,801.58	15,661.30	11,627.59	6,286.04
AA	CIMS Lab, Inc.	OS/390 Cpu Minutes (Initiators)	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	OS/390 Cpu Minutes (All)	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	Tso Cpu Minutes	2003	251.45	247.29	153.03	344.31	456.26	247.92
AA	CIMS Lab, Inc.	Tso Connect Minutes	2003	7,831.06	7,037.75	6,325.41	15,716.42	18,821.58	4,554.65
AA	CIMS Lab, Inc.	Tso Inputs	2003	63.99	66.21	32.48	76.38	130.50	58.01
AA	CIMS Lab, Inc.	Tso Outputs	2003	39.98	42.02	23.79	48.16	78.78	30.93
AA	CIMS Lab, Inc.	Tso Cpu Minutes (Tcb)	2003	0.00					
AA	CIMS Lab, Inc.	Tso Cpu Minutes (Initiator)	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	Tso Cpu Minutes (All)	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	Total SIOs	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	Disk SIOs	2003	18,905.60	7,202.18	18,071.58	11,849.47	6,138.79	4,081.29
AA	CIMS Lab, Inc.	Tape SIOs	2003	5,470.00	4,928.77	5,590.77	13,405.29	6,267.71	3,605.01
AA	CIMS Lab, Inc.	3390 SIO's	2003	0.00					
AA	CIMS Lab, Inc.	3380 SIO's	2003	0.00					
AA	CIMS Lab, Inc.	3375 SIO's	2003	0.00					
AA	CIMS Lab, Inc.	3480 SIO's	2003	0.00					
AA	CIMS Lab, Inc.	3420 SIO's	2003	0.00					
AA	CIMS Lab, Inc.	Virtual SIO's	2003	0.00					
AA	CIMS Lab, Inc.	Input Records	2003	660.32	696.66	597.39	621.03	1,798.41	386.05
AA	CIMS Lab, Inc.	Tape Mounts	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	Disk Data Sets	2003	6,434.25	8,769.00	6,058.25	8,767.50	10,739.75	4,743.75
AA	CIMS Lab, Inc.	DB2 Transactions (Records)	2003	0.52	0.52	0.26	0.78	0.52	0.26
AA	CIMS Lab, Inc.	DB2 Transaction Elapsed Minutes	2003	0.12	0.09	0.02	0.25	0.05	0.04
AA	CIMS Lab, Inc.	MS Windows Disk Size in MB	2003	0.00	0.00	0.00	0.00	0.00	0.00
AA	CIMS Lab, Inc.	MS Windows Number of Files	2003	0.08	0.08	0.12	0.14	0.10	0.10

Figure A-67 • Account Summary YTD by Rate Spreadsheet Example

Account Summary YTD Cost by Rate Group Spreadsheet

File name: SYTDC003.rpt

Stored Procedure. None

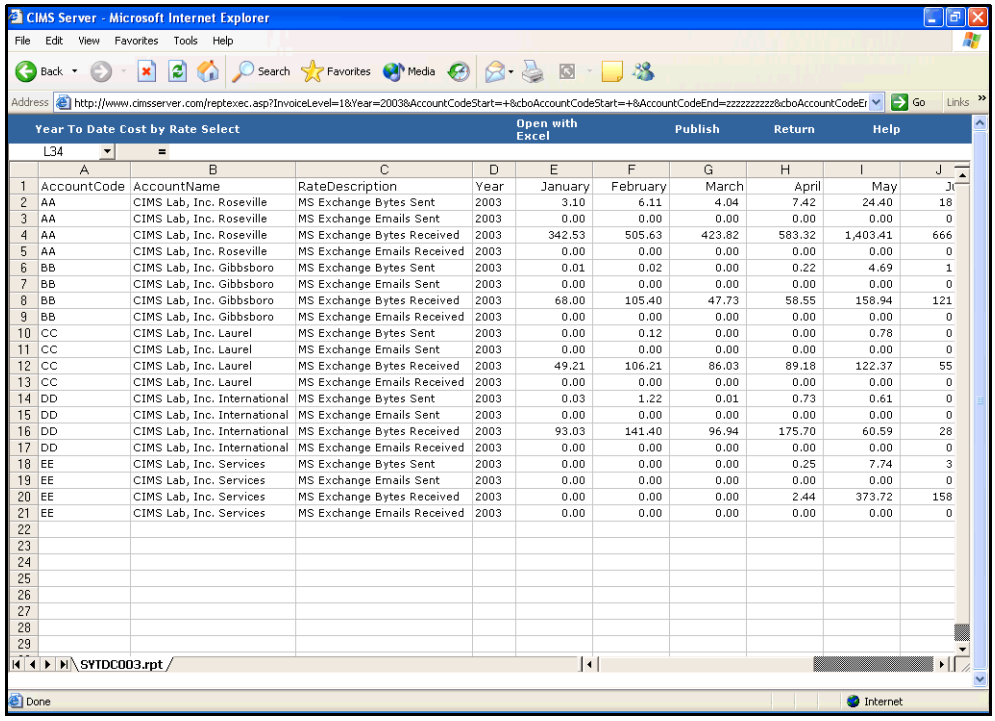
This spreadsheet provides account summary YTD information by rate code description for the rate group selected for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Report Year
- Starting and Ending Account Code
- Rate Group

Report Example



	A	B	C	D	E	F	G	H	I	J
1	AccountCode	AccountName	RateDescription	Year	January	February	March	April	May	Jı
2	AA	CIMS Lab, Inc. Roseville	MS Exchange Bytes Sent	2003	3.10	6.11	4.04	7.42	24.40	18
3	AA	CIMS Lab, Inc. Roseville	MS Exchange Emails Sent	2003	0.00	0.00	0.00	0.00	0.00	0
4	AA	CIMS Lab, Inc. Roseville	MS Exchange Bytes Received	2003	342.53	505.63	423.82	583.32	1,403.41	666
5	AA	CIMS Lab, Inc. Roseville	MS Exchange Emails Received	2003	0.00	0.00	0.00	0.00	0.00	0
6	BB	CIMS Lab, Inc. Gibbsboro	MS Exchange Bytes Sent	2003	0.01	0.02	0.00	0.22	4.69	1
7	BB	CIMS Lab, Inc. Gibbsboro	MS Exchange Emails Sent	2003	0.00	0.00	0.00	0.00	0.00	0
8	BB	CIMS Lab, Inc. Gibbsboro	MS Exchange Bytes Received	2003	68.00	105.40	47.73	58.55	158.94	121
9	BB	CIMS Lab, Inc. Gibbsboro	MS Exchange Emails Received	2003	0.00	0.00	0.00	0.00	0.00	0
10	CC	CIMS Lab, Inc. Laurel	MS Exchange Bytes Sent	2003	0.00	0.12	0.00	0.00	0.78	0
11	CC	CIMS Lab, Inc. Laurel	MS Exchange Emails Sent	2003	0.00	0.00	0.00	0.00	0.00	0
12	CC	CIMS Lab, Inc. Laurel	MS Exchange Bytes Received	2003	49.21	106.21	86.03	89.18	122.37	55
13	CC	CIMS Lab, Inc. Laurel	MS Exchange Emails Received	2003	0.00	0.00	0.00	0.00	0.00	0
14	DD	CIMS Lab, Inc. International	MS Exchange Bytes Sent	2003	0.03	1.22	0.01	0.73	0.61	0
15	DD	CIMS Lab, Inc. International	MS Exchange Emails Sent	2003	0.00	0.00	0.00	0.00	0.00	0
16	DD	CIMS Lab, Inc. International	MS Exchange Bytes Received	2003	93.03	141.40	96.94	175.70	60.59	28
17	DD	CIMS Lab, Inc. International	MS Exchange Emails Received	2003	0.00	0.00	0.00	0.00	0.00	0
18	EE	CIMS Lab, Inc. Services	MS Exchange Bytes Sent	2003	0.00	0.00	0.00	0.25	7.74	3
19	EE	CIMS Lab, Inc. Services	MS Exchange Emails Sent	2003	0.00	0.00	0.00	0.00	0.00	0
20	EE	CIMS Lab, Inc. Services	MS Exchange Bytes Received	2003	0.00	0.00	0.00	2.44	373.72	158
21	EE	CIMS Lab, Inc. Services	MS Exchange Emails Received	2003	0.00	0.00	0.00	0.00	0.00	0
22										
23										
24										
25										
26										
27										
28										
29										

Figure A-68 • Account Summary YTD Cost by Rate Group Spreadsheet Example

Crosstab Reports

This section describes the CIMS Server crosstab reports. You can run a crosstab report as a report or a spreadsheet. The examples in this section show the report format.

Daily Crosstab–Charges

File name: `XDAYC001.rpt`

Stored procedure: `CIMSSP_Summary_Day`

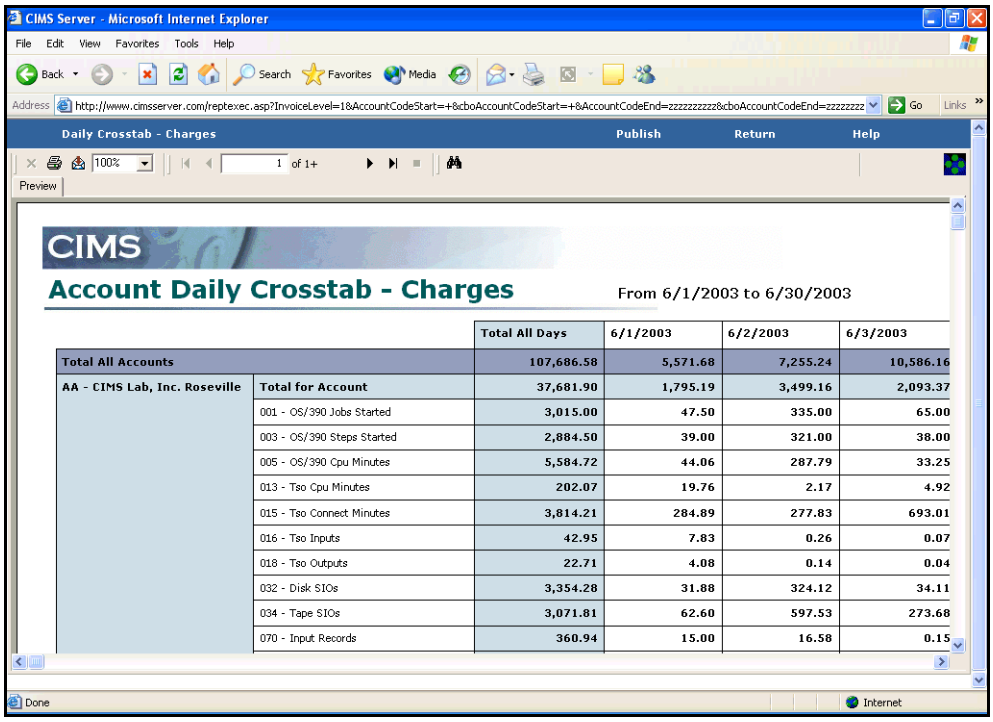
This report provides total daily charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example



		Total All Days	6/1/2003	6/2/2003	6/3/2003
Total All Accounts		107,686.58	5,571.68	7,255.24	10,586.16
AA - CIMS Lab, Inc. Roseville	Total for Account	37,681.90	1,795.19	3,499.16	2,093.37
	001 - OS/390 Jobs Started	3,015.00	47.50	335.00	65.00
	003 - OS/390 Steps Started	2,884.50	39.00	321.00	38.00
	005 - OS/390 Cpu Minutes	5,584.72	44.06	287.79	33.25
	013 - Tso Cpu Minutes	202.07	19.76	2.17	4.92
	015 - Tso Connect Minutes	3,814.21	284.89	277.83	693.01
	016 - Tso Inputs	42.95	7.83	0.26	0.07
	018 - Tso Outputs	22.71	4.08	0.14	0.04
	032 - Disk SIOs	3,354.28	31.88	324.12	34.11
	034 - Tape SIOs	3,071.81	62.60	597.53	273.68
	070 - Input Records	360.94	15.00	16.58	0.15

Figure A-69 • Daily Crosstab–Charges Report Example

Daily Crosstab–Usage

File name: XDAYR001.rpt

Stored procedure: CIMSSP_Summary_Day

This report provides total daily resource usage by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

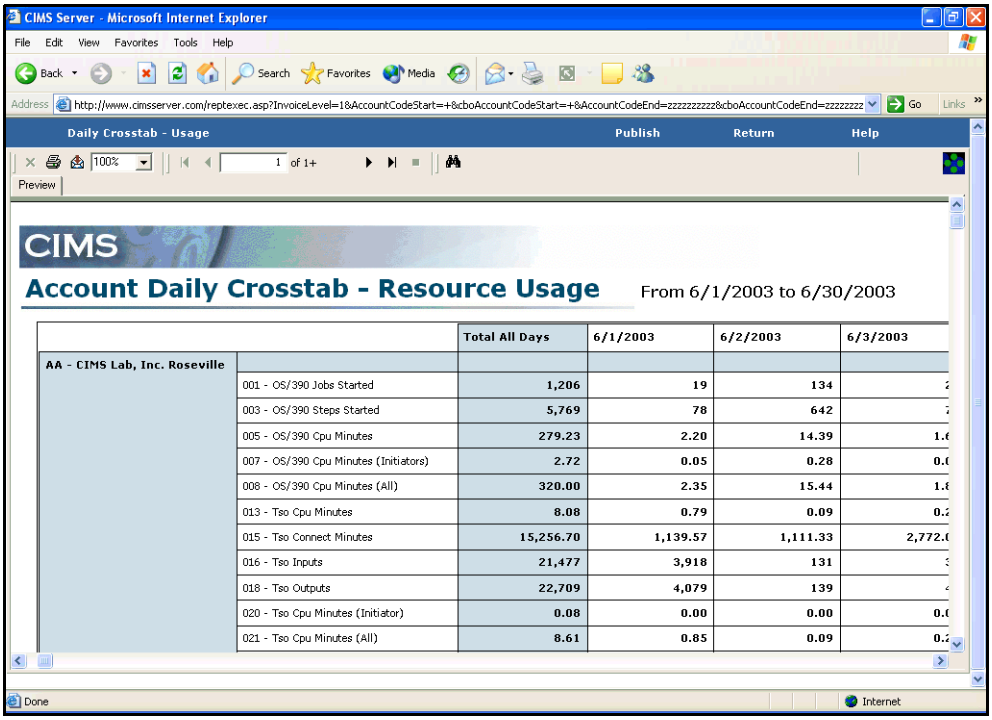


Figure A-70 • Daily Crosstab–Usage Report Example

Detail by Identifier Crosstab

File name: XDETR001.rpt

Stored procedure: CIMSSP_Ident_Crosstab

This report provides total charges by rate code for a selected identifier value or values for the date range selected.

Drill down: None

Parameters:

- From and To Date
- Identifier
- Start and End Value

Report Example

In this example, the identifier selected is Exchange User and the identifier start and end values are both deborah.

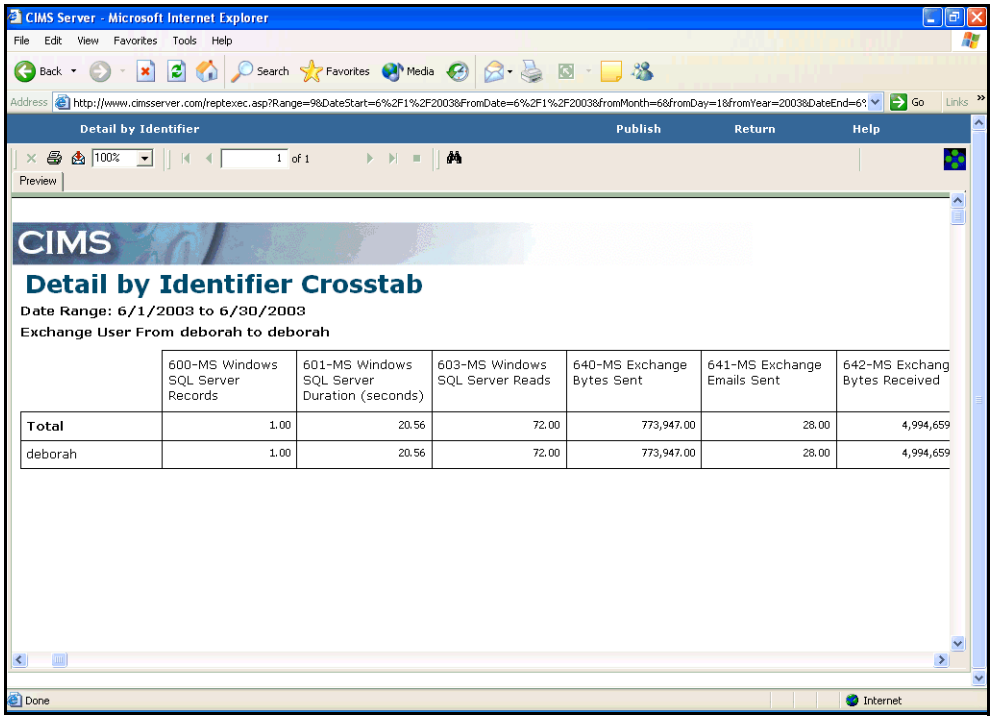


Figure A-71 • Detail by Identifier Crosstab Report Example

Detail by Identifier by Date Crosstab

File name: XDETR002.rpt

Stored procedure: CIMSSP_Ident_Crosstab_StartDate

This crosstab report provides total and total daily charges by rate code for a selected identifier value or values for the date range selected.

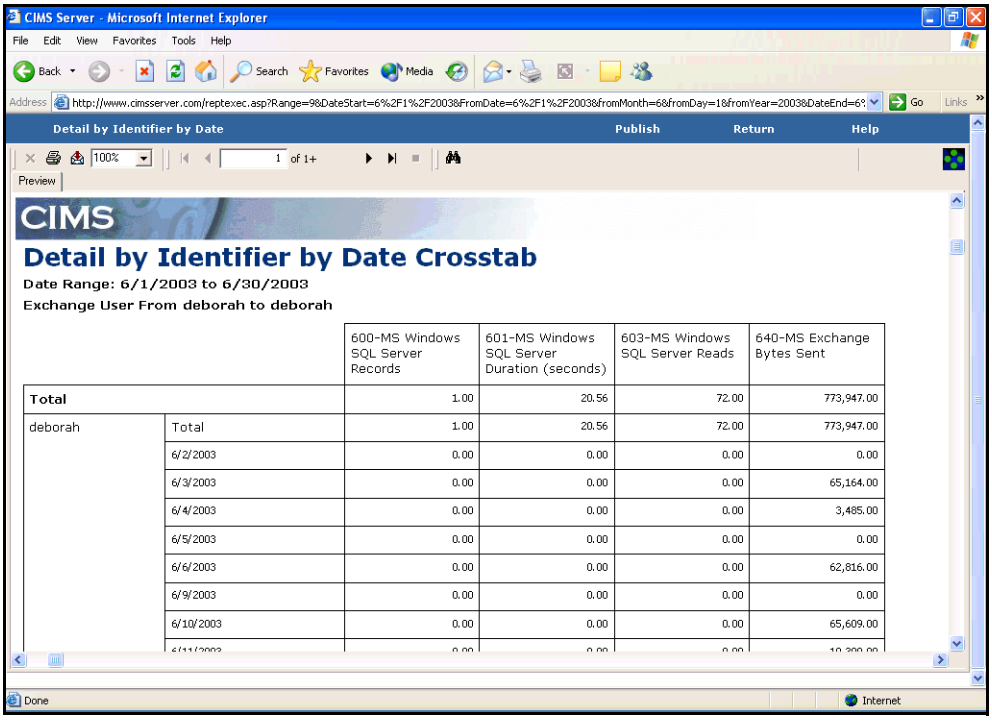
Drill down: None

Parameters:

- From and To Date
- Identifier
- Start and End Value

Report Example

In this example, the identifier selected is Exchange User and the identifier start and end values are both deborah.



		600-MS Windows SQL Server Records	601-MS Windows SQL Server Duration (seconds)	603-MS Windows SQL Server Reads	640-MS Exchange Bytes Sent
Total		1.00	20.56	72.00	773,947.00
deborah	Total	1.00	20.56	72.00	773,947.00
	6/2/2003	0.00	0.00	0.00	0.00
	6/3/2003	0.00	0.00	0.00	65,164.00
	6/4/2003	0.00	0.00	0.00	3,485.00
	6/5/2003	0.00	0.00	0.00	0.00
	6/6/2003	0.00	0.00	0.00	62,816.00
	6/9/2003	0.00	0.00	0.00	0.00
	6/10/2003	0.00	0.00	0.00	65,609.00

Figure A-72 • Detail by Identifier by Date Crosstab Report Example

Monthly Crosstab–Charges

File name: XMONC001.rpt

Stored procedure: CIMSSP_Summary_Day

This report provides total monthly charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

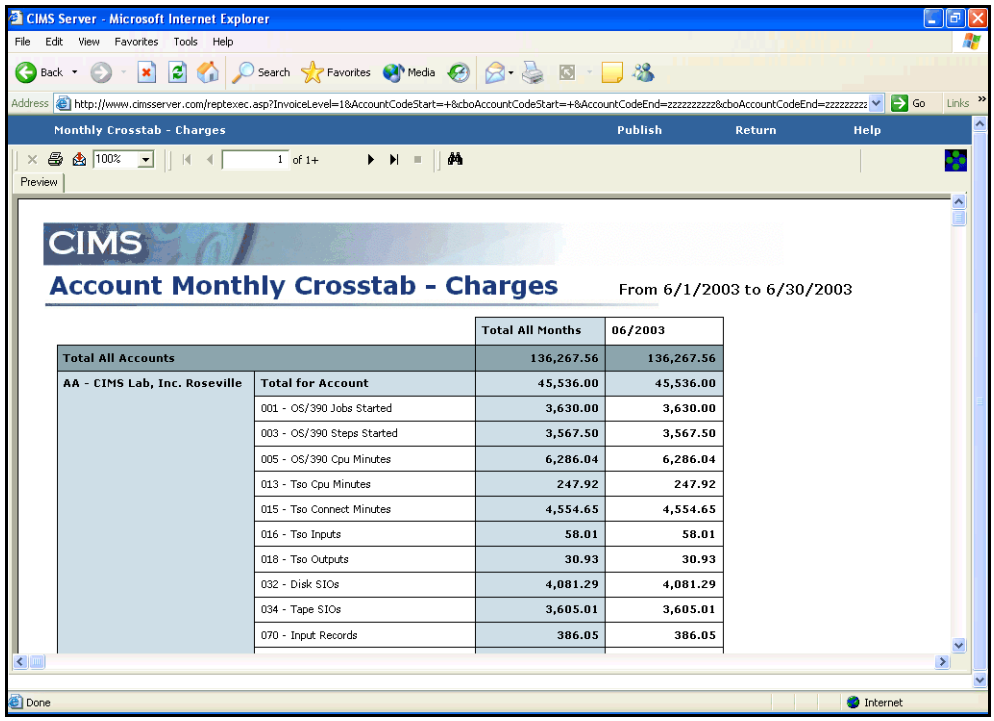


Figure A-73 • Monthly Crosstab–Charges Report Example

Monthly Crosstab–Usage

File name: XMONR001.rpt

Stored procedure: CIMSSP_Summary_Day

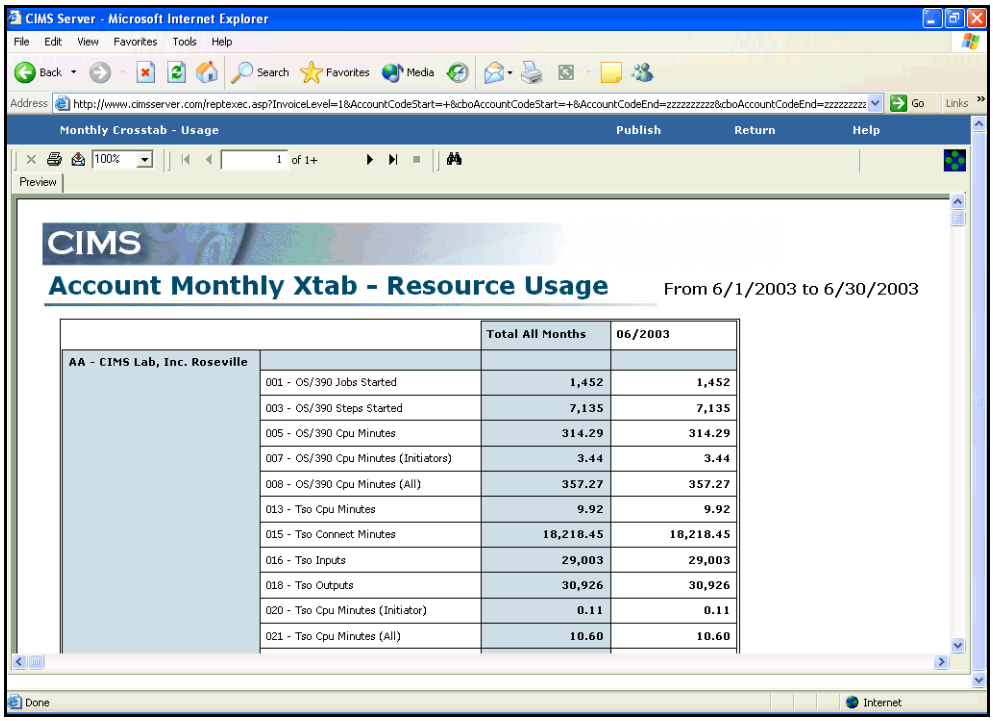
This report provides total monthly resource usage by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example



		Total All Months	06/2003
AA - CIMS Lab, Inc. Roseville			
	001 - OS/390 Jobs Started	1,452	1,452
	003 - OS/390 Steps Started	7,135	7,135
	005 - OS/390 Cpu Minutes	314.29	314.29
	007 - OS/390 Cpu Minutes (Initiators)	3.44	3.44
	008 - OS/390 Cpu Minutes (All)	357.27	357.27
	013 - Tso Cpu Minutes	9.92	9.92
	015 - Tso Connect Minutes	18,218.45	18,218.45
	016 - Tso Inputs	29,003	29,003
	018 - Tso Outputs	30,926	30,926
	020 - Tso Cpu Minutes (Initiator)	0.11	0.11
	021 - Tso Cpu Minutes (All)	10.60	10.60

Figure A-74 • Monthly Crosstab–Usage Report Example

Summary Crosstab–Charges

File name: XSUMC001.rpt

Stored procedure: CIMSSP_Summary

This report provides total charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

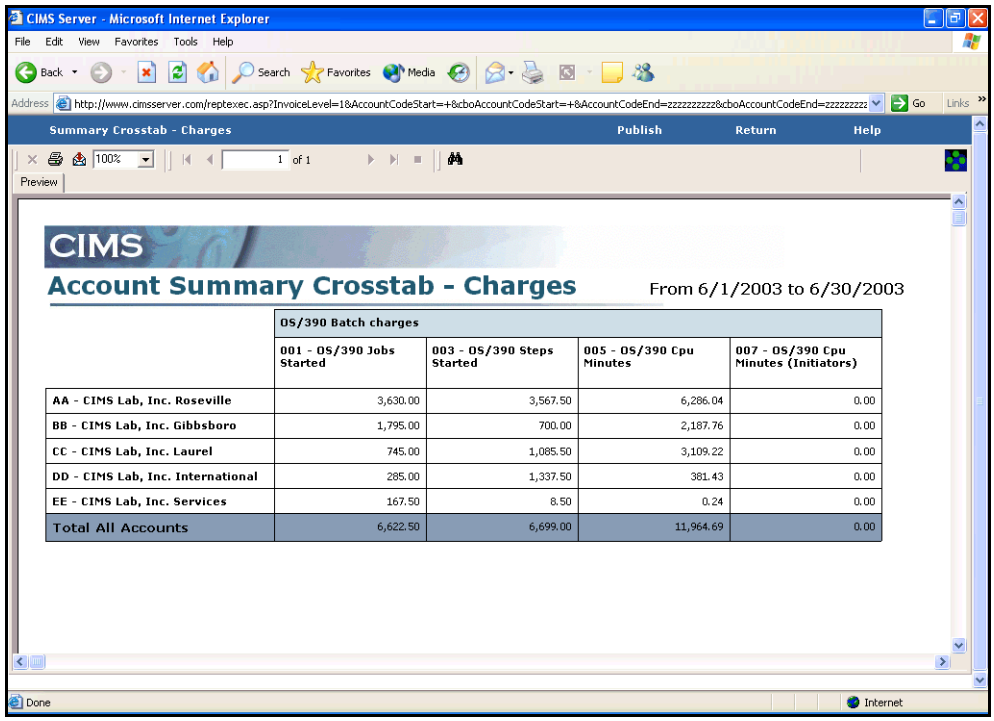


Figure A-75 • Summary Crosstab–Charges Report Example

Summary by Rate Group Crosstab–Charges

File name: XSUMC002.rpt

Stored procedure: CIMSSP_Summary_RateGroup

This report provides total charges by account code and rate code description for the rate codes within a selected rate group for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Group

Report Example

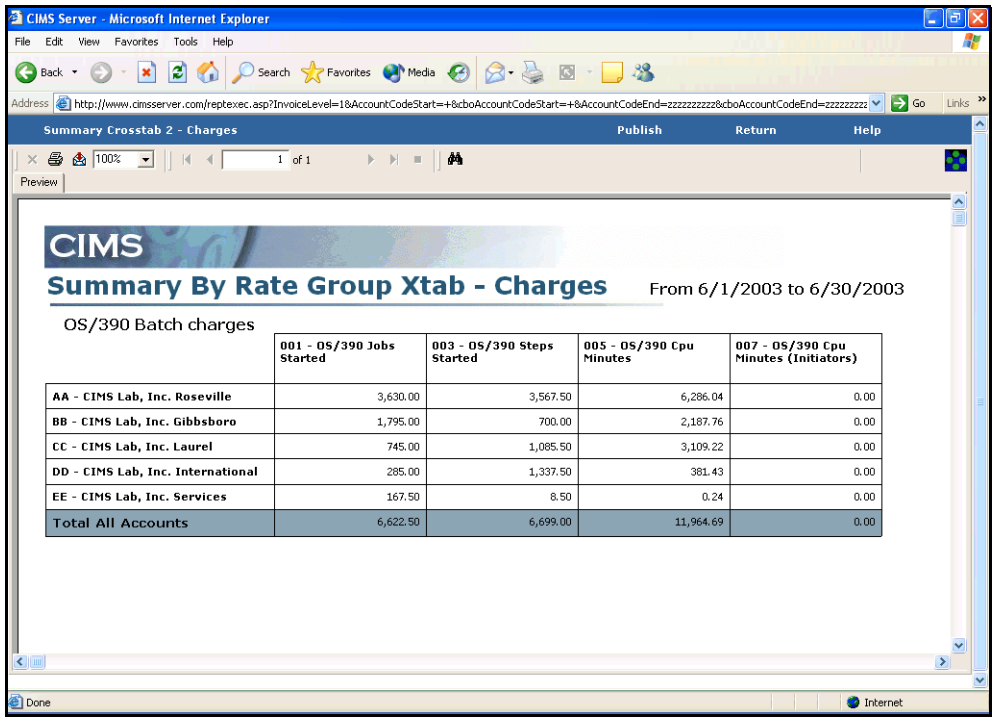


Figure A-76 • Summary by Rate Group Crosstab–Charges Report Example

Summary Crosstab–Usage

File name: XSUMR001.rpt

Stored procedure: CIMSSP_Summary

This report provides total resource usage by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

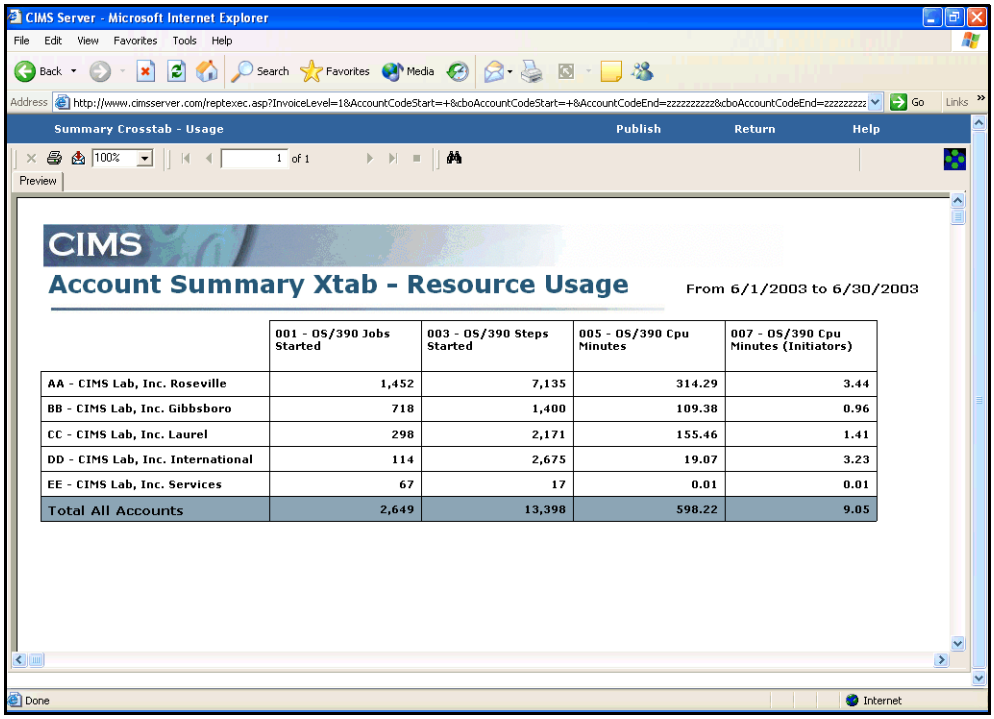


Figure A-77 • Summary Crosstab–Usage Report Example

Summary by Rate Group Crosstab–Usage

File name: XSUMR002.rpt

Stored procedure: CIMSSP_Summary_RateGroup

This report provides total resource usage by account code and rate code description for the rate codes within a selected rate group for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Rate Group

Report Example

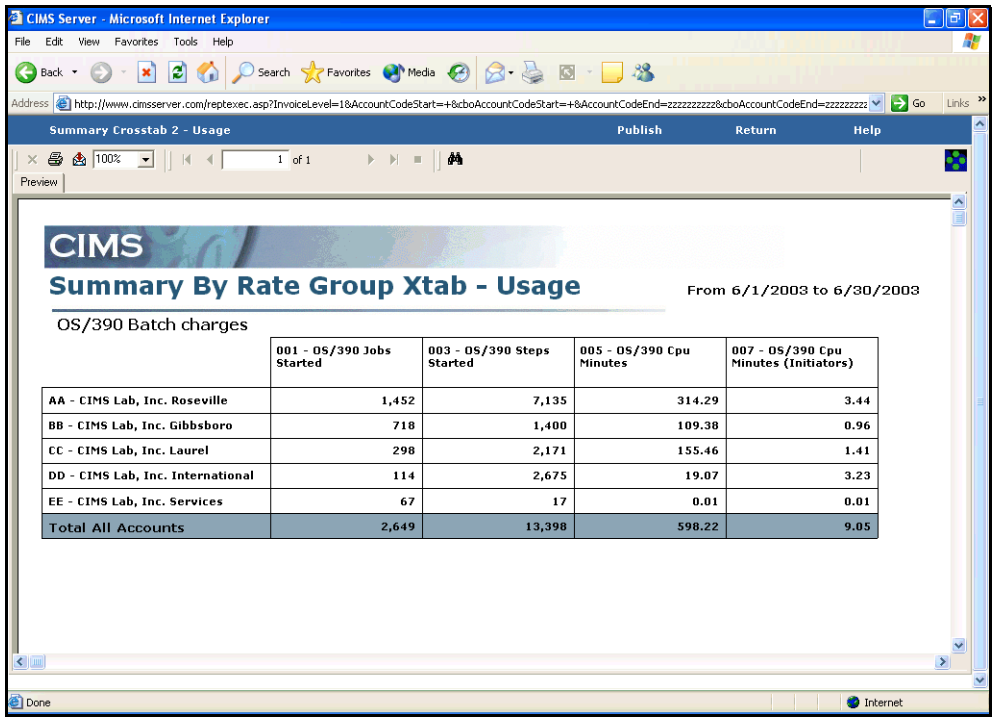


Figure A-78 • Summary by Rate Group Crosstab–Usage Report Example

Weekly Crosstab–Charges

File name: XWEKC001.rpt

Stored procedure: CIMSSP_Summary_Day

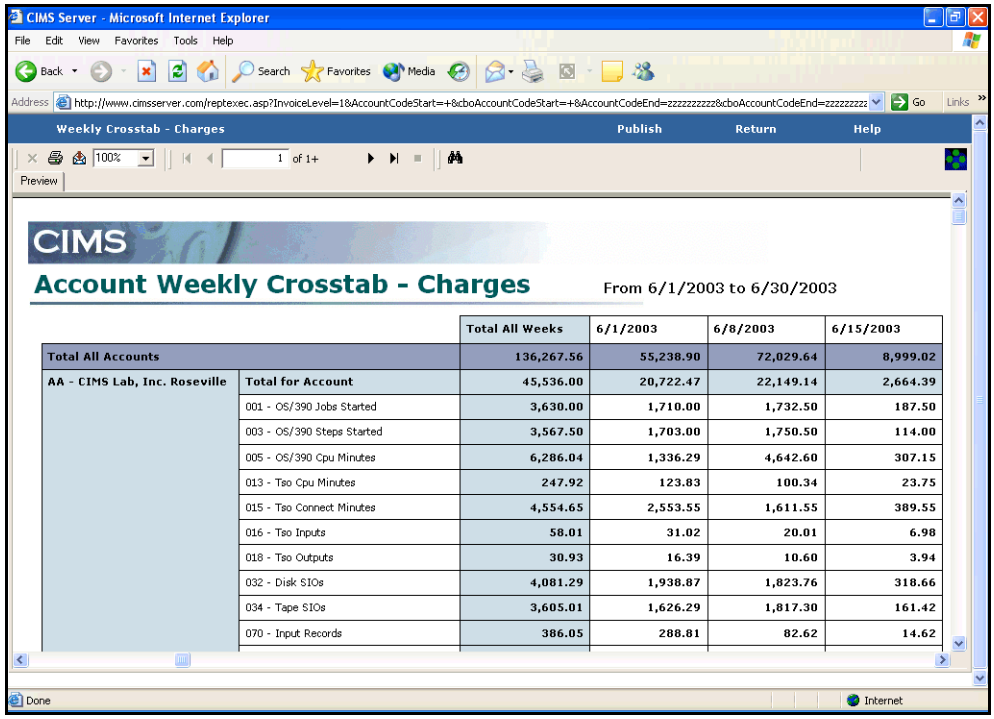
This report provides total weekly charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example



		Total All Weeks	6/1/2003	6/8/2003	6/15/2003
Total All Accounts		136,267.56	55,238.90	72,029.64	8,999.02
AA - CIMS Lab, Inc. Roseville	Total for Account	45,536.00	20,722.47	22,149.14	2,664.39
	001 - OS/390 Jobs Started	3,630.00	1,710.00	1,732.50	187.50
	003 - OS/390 Steps Started	3,567.50	1,703.00	1,750.50	114.00
	005 - OS/390 Cpu Minutes	6,286.04	1,336.29	4,642.60	307.15
	013 - Tso Cpu Minutes	247.92	123.83	100.34	23.75
	015 - Tso Connect Minutes	4,554.65	2,553.55	1,611.55	389.55
	016 - Tso Inputs	58.01	31.02	20.01	6.98
	018 - Tso Outputs	30.93	16.39	10.60	3.94
	032 - Disk SIOs	4,081.29	1,938.87	1,823.76	318.66
	034 - Tape SIOs	3,605.01	1,626.29	1,817.30	161.42
	070 - Input Records	386.05	288.81	82.62	14.62

Figure A-79 • Weekly Crosstab–Charges Report Example

Weekly Crosstab–Usage

File name: XWEKR001.rpt

Stored procedure: CIMSSP_Summary_Day

This report provides total weekly resource usage by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date

Report Example

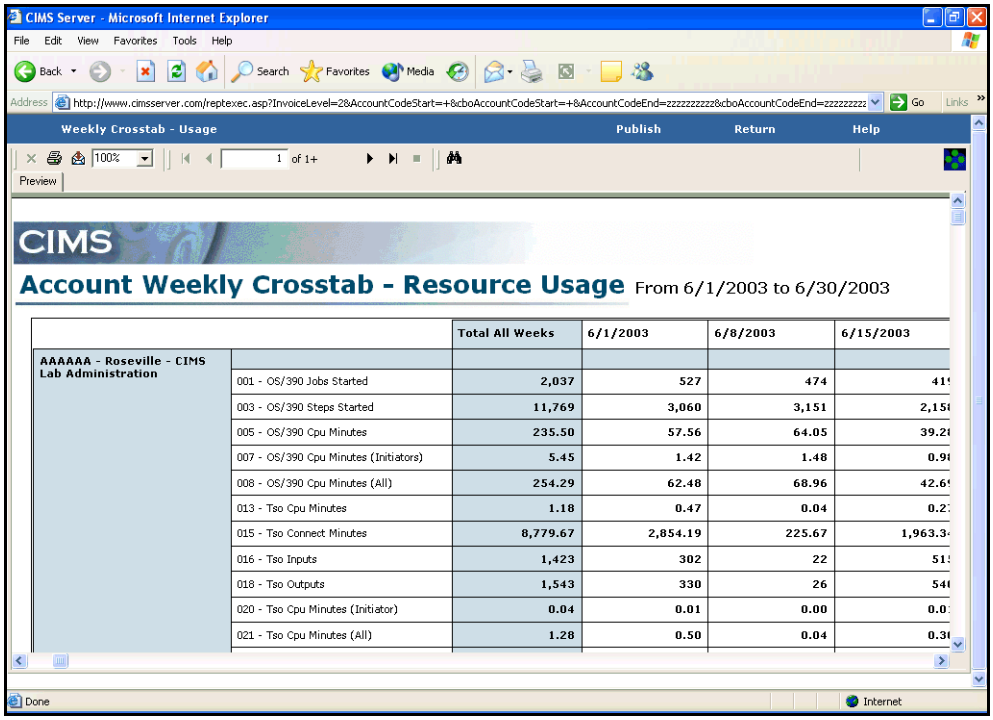


Figure A-80 • Weekly Crosstab–Usage Report Example

Templates

This section describes CIMS Server report templates. These templates are launched when you create a report in CIMS Server Web Reporting (see *Creating and Running CIMS Web User Created Reports* on page 2-9). Templates can be customized, but custom templates must be stored in the same directory as the standard templates. If CIMS Server is installed in the default path, the location is `C:\Program Files\CIMSLab\Server\Reports\Standard\Templates`. Please consult CIMS Lab before you customize templates.

Report Both Template

File name: `RTMPB001.rpt`

Stored procedure: `CIMSSP_Summary`

This template produces Both reports that show resource usage and charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Four rate codes (selected when report was created)
- Four decimal place options (selected when report was created)

Report Examples

Figure A-81 shows the creation of a Both report called Job Report. Figure A-82 shows the resulting report that has been run from the **Reports** menu.

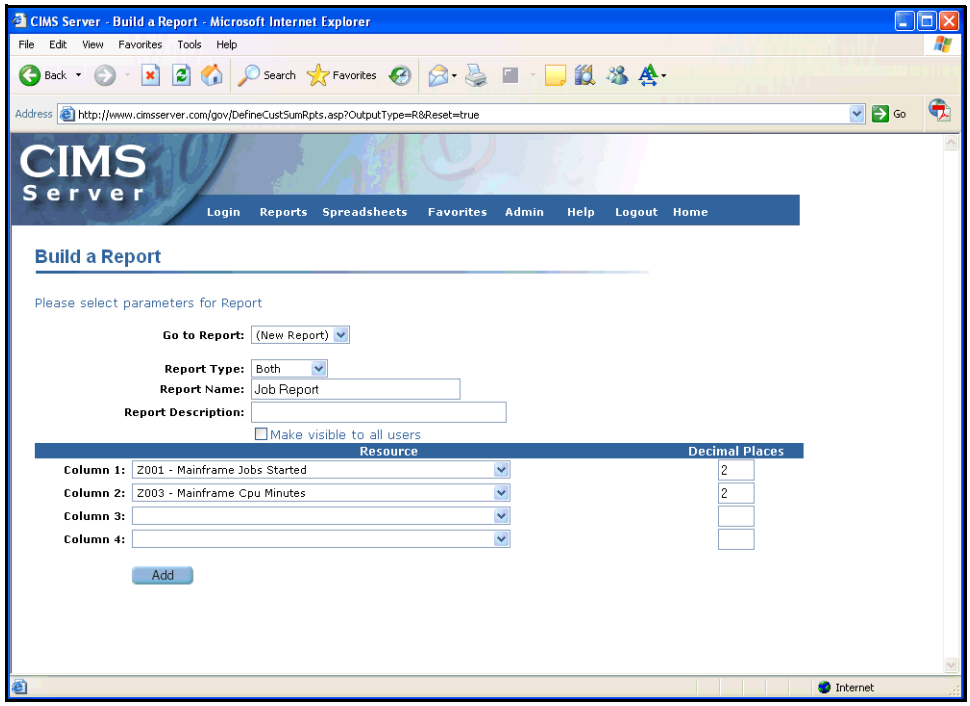


Figure A-81 • Creating a Report Example

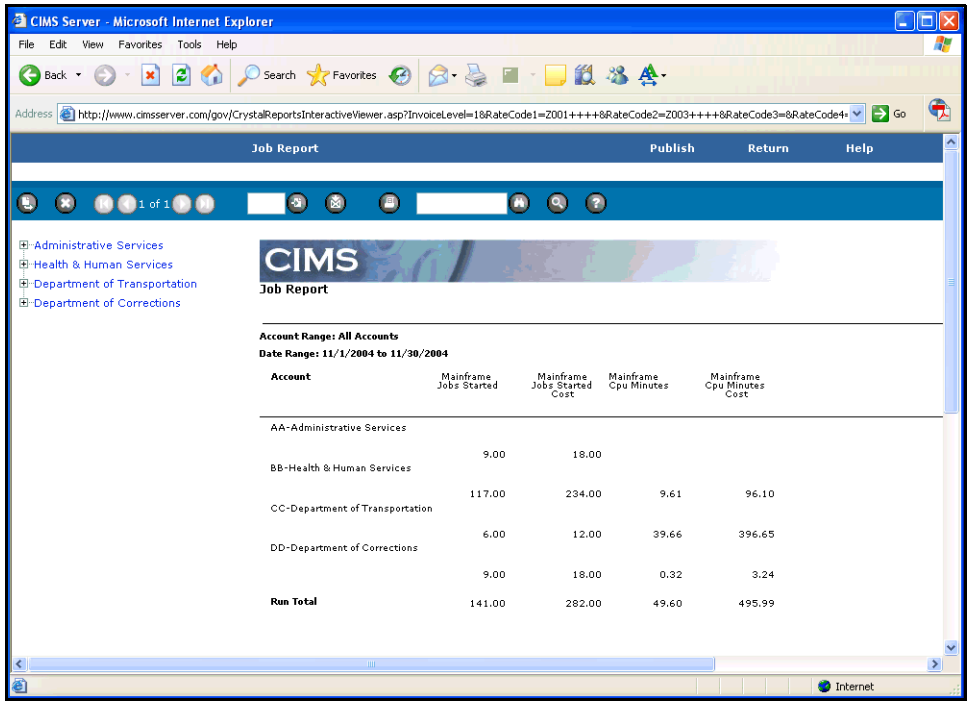


Figure A-82 • Generated Report Example

The preceding examples are also applicable to the Cost and Resource reports with the following exceptions:

- The Report Type is Cost or Resource rather than Both.
- The resulting report shows resource usage or charges, not both.

Report Cost Template

File name: `RTMPC001.rpt`

Stored procedure: `CIMSSP_Summary`

This template produces Cost reports that show charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Eight rate codes (selected when report was created)
- Eight decimal place options (selected when report was created)

Report Example

See page A-107.

Report Resource Template

File name: RTMPR001.rpt

Stored procedure: CIMSSP_Summary

This template produces Resource reports that show resource usage by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Eight rate codes (selected when report was created)
- Eight decimal place options (selected when report was created)

Report Example

See page A-107.

Spreadsheet Both Template

File name: STMPB001.rpt

Stored Procedure. None

This template produces Both spreadsheets that show resource usage and charges by account code and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Four rate codes (selected when spreadsheet was created)
- Four decimal place options (selected when spreadsheet was created)

Report Example

Figure A-82 shows the creation of a Both spreadsheet called Oracle Usage. Figure A-83 shows the resulting report that has been run from the **Spreadsheets** menu.

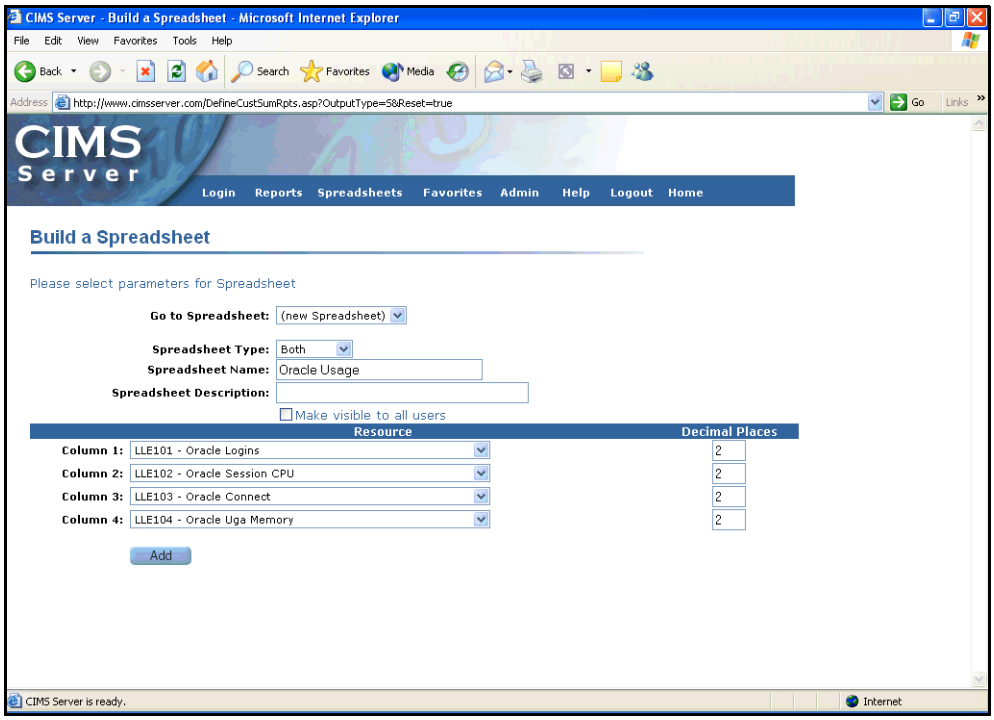


Figure A-83 • Creating a Spreadsheet Example

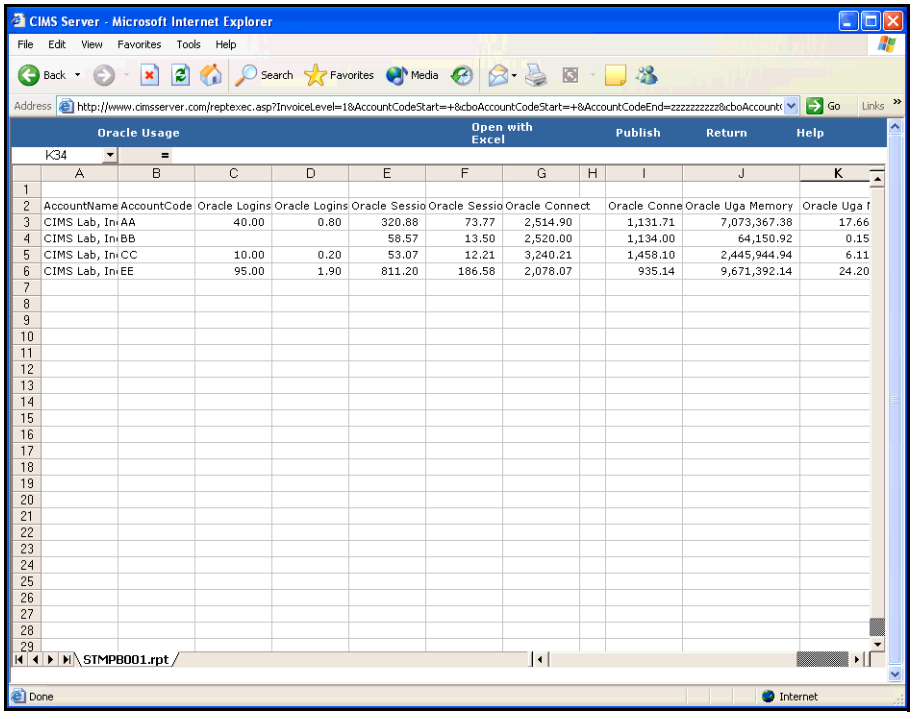


Figure A-84 • Generated Spreadsheet Example

The preceding examples are also applicable to the Cost and Resource spreadsheets with the following exceptions:

- The Spreadsheet Type is Cost or Resource rather than Both.
- The resulting spreadsheet shows resource usage or charges, not both.

Spreadsheets Cost Template

File name: `STMPC001.rpt`

Stored Procedure. None

This template produces Cost reports that show charges by account and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Eight rate codes (selected when spreadsheet was created)
- Eight decimal place options (selected when spreadsheet was created)

Report Example

See page A-110.

Spreadsheets Resource Template

File name: STMPR001.rpt

Stored Procedure. None

This template produces Resource spreadsheets that show resource usage by account and rate code description for the parameters selected.

Drill down: None

Parameters:

- Account Code Level
- Starting and Ending Account Code
- From and To Date
- Eight rate codes (selected when spreadsheet was created)
- Eight decimal place options (selected when spreadsheet was created)

Report Example

See page A-110.

Glossary

ASP • Acronym for Active Server Pages. A server-side scripting environment developed by Microsoft for developing Web pages and applications.

CIMS Server Resource File • The resource file that contains the data that is input into CIMS Server. The CIMS Server Resource File contains CIMS Server Resource Records. These records are comma-delimited and can contain a very large number of resource identifiers and resources. *See also identifier and rate code.*

cookie • A small text file that stores information about a Web site user. CIMS Server Web Reporting stores user information, such as the report parameter values entered by a user, in a cookie.

DSN • Acronym for Data Source Name. The name assigned to an ODBC data source.

identifier • In the CIMS Server Resource Record, a unique key that denotes the source of a resource that has been consumed. Examples include device name, server name, system ID, phone number, user ID, state code or building number. A consumed resource can have one to many identifiers.

IIS • Acronym for Internet Information Services. Microsoft software that supports Web site creation, configuration, and management.

ODBC • Acronym for Open Database Connectivity. An interface providing a common language for database access.

rate code • A rate code represents the resource units being reported (for example, CPU time, transactions processed or lines printed). The rate code includes the value for the resource and other rate processing information.

stored procedure • A set of SQL statements that can perform both queries and actions that allow the system to generate a report or reports.

URL • Acronym for Uniform Resource Locator. The address for a resource on the Internet or an intranet.

XML • Acronym for Extensible Markup Language. A meta-markup language that provides a format for describing structured data. XML allows for more precise declarations or content and more meaningful search results across multiple platforms.

Index

A

account codes
  explanation of 2-7
  selecting account code structure for reports 5-5
  setting levels that appear in starting and ending parameter lists 5-9
adding
  favorite reports 5-2
  transactions 6-3
advanced spreadsheets *See* CIMS Advanced Spreadsheets
auto log on, using 1-3

B

billing for miscellaneous, recurring, or credit items *See* transactions
browser
  Crystal Report viewer for, selecting
    for a user 5-6
    for all users 5-9
  resetting 5-7

C

CIMS Advanced Spreadsheets
  about 4-2
  closing in Excel 4-13
  columns in, description 4-9
  customizing and creating 5-12 to 5-19
  descriptions of 4-14 to 4-29
  drill down in 4-10 to 4-11
    example 4-10 to 4-11
  editing 4-12
  interface, description of 4-8
  opening in Excel 4-12
  parameters for 4-4 to 4-5
  printing 4-12
  running
    crosstab spreadsheets 4-6 to 4-7
    drill down or static spreadsheets 4-3 to 4-5
  saving 4-13
configuring CIMS Server Web Reporting
  system-wide configuration 5-8 to 5-10
  user-specific configuration 5-2 to 5-6
creating and running Web user reports 2-9 to 2-11
credits, applying *See* transactions
crosstab reports (standard), descriptions of A-94 to A-105
Crystal Reports
  creating parameter fields in 5-11
  use in CIMS Server Web Reporting 1-2
  viewer
    selecting for a user 5-6
    selecting for all users 5-9

D

deleting
  favorite reports 5-4
  reports created by Web user 2-10
  transactions 6-4
drill down in reports
  closing 3-5
  example 3-6 to 3-7
  using 3-4 to 3-7

E

editing
- CIMS Advanced Spreadsheets 4-12
- spreadsheets 3-10
- transactions 6-4

e-mail address, setting 5-7

F

favorite reports
- about 5-2
- accessing 5-3 to 5-4
- adding 5-2
- deleting 5-4

H

Help, accessing 1-6

I

invoice number
- parameter setting 2-5
- system setting 5-8

L

logging on to CIMS Server Web Reporting 1-3 to 1-4

logging out of CIMS Server Web Reporting 1-6

M

menu bar, using 1-5

N

navigating
- CIMS Server Web Reporting 1-5
- reports 3-3, 3-4
- transactions 6-4

O

organization name and address, setting 5-8

P

parameters
- for CIMS Advanced Spreadsheets 4-4 to 4-5
  - customizing 5-16
- for reports 2-4 to 2-6
  - customizing 5-11
- for transactions 6-3
  - customizing 5-11

password
- about 1-5
- changing 1-5
- entering 1-3

paths for published reports, showing or hiding 5-5

printing
- CIMS Advanced Spreadsheets 4-12
- reports 3-3
- spreadsheets 3-10

published reports
- creating 2-12 to 2-13
- filtering 2-15
- folder paths to, showing or hiding 5-5
- sorting 2-15
- viewing 2-14
- vs saved reports 2-12

R

reports
- created by Web user 2-9
  - deleting 2-10
  - running 2-10
  - updating 2-9
- drill down in 3-4 to 3-7
  - example 3-6 to 3-7
- favorites
  - about 5-2
  - accessing 5-3 to 5-4
  - adding 5-2
  - deleting 5-4
- interface, description of 3-2
- navigating 3-3, 3-4
- parameters for 2-4 to 2-6
  - customizing 5-11
- printing 3-3
- published
  - creating 2-12 to 2-13
  - example 2-16
  - filtering 2-15
  - folder paths to, showing or hiding 5-5
  - sorting 2-15
  - viewing 2-14
  - vs saved reports 2-12
- running 2-3 to 2-4
- saving 3-3, 3-8

standard
about A-4
descriptions of A-8 to A-112
templates (standard)
descriptions of A-106 to A-112
text
copying text from 3-8
searching for text in 3-3
types of 2-2

S

saving
CIMS Advanced Spreadsheets 4-13
reports 3-3
spreadsheets 3-10
security
permissions required for folders 1-7
user access to reports 2-13
spreadsheets
closing in Excel 3-10
created by Web user *See* reports, created by Web user
editing 3-10
favorites *See* reports, favorites
interface, description of 3-9
opening in Excel 3-10
parameters for *See* reports, parameters for
printing 3-10
published *See* published reports
running *See* reports, running
saving 3-10
standard, descriptions of A-82 to A-93
standard reports
about A-4
descriptions of A-8 to A-112
starting CIMS Server Web Reporting 1-2

T

technical support, contacting 7-5
templates (standard), descriptions of A-106 to A-112
timing out
about 1-6
setting for 5-8
transactions
about 6-2
adding 6-3
deleting 6-4
editing 6-4
navigating 6-4
parameters for 6-3
customizing 5-11
troubleshooting 7-2 to 7-4

U

URL, entering 1-2
user ID, entering 1-3