Version 1.5

Viewing Reports in the Web Portal

Introduction

This video describes the reports that are available for partners and others in the Web Portal, including the Dash Panel, billing reports, and Event and Audit logs. This is an advanced training video that covers the **Reports** menu option in the Web Portal in detail. Before watching this video, you should have viewed the related video in this series entitled, *Overview of the Web Portal*.

Where you can display reports

Reports are lists of compiled information. Some reports have the word "report" in their title, and others do not. Most of the reports that are available in the Web Portal can be generated and displayed from the **Reports** menu option. However, some reports can only be accessed through icons, links, or menu options in the Account List or the Account Center, such as the Hardware Status report for eFolder BDRs, the Summary report, the Backup Settings report, and the AppAssure CORE Details report.

This video only describes the reports that are available from the **Reports** menu option. For information on the reports that are available from the Account List or the Account Center, see the related videos in this series entitled, "Using the Account List in the Web Portal" and "Using the Account Center in the Web Portal."

Some reports are available from both the **Reports** main menu option or the Account List or Account Center. When these reports are accessed from the Account List or Account Center, they are specific to a single account. For example, if you display the Event Log from the Account List or Account Center, the report is specific to a single account—the account you selected when you generated the report. However, if you display this same report from the **Reports** menu option, it summarizes the information across several accounts, according to the search criteria you enter on that page.

If you are using a service that requires the Backup Manager, additional reports are available in the **System Status** tab of the Backup Manager, including the System Log, which is a complete list of all backups, the Backup Summary report, the Backup Details report, and graphs displaying disk usage and number of files backed up over time.

Finally, some reports are available only from the local administrative software that the service is using, such as the administrative programs used with BDRs and eFolder Email Security accounts.

The Dash Panel Report

In this video, we'll focus on reports that are available from the drop-down menu of the **Reports** main menu option in the Web Portal.

To begin, click the *Dash Panel* option in the **Reports** menu to display the Dash Panel Report. This is the single most important report that partners can display in the Web Portal. You should view this report frequently—at least daily—because it uses color-coded rows to visually summarize the status of all of the services across all of your accounts. Use this report to see if your customers' backup, replication, and email archiving services are functioning as they should and are error free.

The Dash Panel Report displays a snapshot of the status of all your accounts in tabular format at the time you displayed the report. This report is *not* a "live" display that is updated automatically. To update the report at any time, click the **Refresh** button at the top of the page.

The Dash Panel Report is divided up into sections by brand, although most partners only have one brand and therefore see only one section. Within each section, the accounts are displayed one per row with a colored background that indicates the status of the account at the time the Dash Panel Report was created or refreshed. A green background means "good" and applies to accounts that do not have any warnings or detected errors. A yellow background means "warning" and applies to accounts that require human attention and are having minor issues. A red background means "error" and applies to accounts that require human attention and are having major issues. A blue background means the account has been created but has not yet been used for backup or other services.

The columns in the report display status and other account information, as indicated by the field names at the top of the columns. The checkboxes at the top of the list further control how the account entries are displayed. Checking *Group by account status* groups the accounts according to their current status, as indicated by their colored backgrounds. After checking this checkbox, all red accounts are grouped together, all yellow accounts are grouped together, all green accounts are grouped together, and all blue accounts are grouped together within that brand.

Checking *Use friendly dates* affects how dates are displayed in the *Last Backup* and *Last Successful* fields. Checking this box displays how many *days* it has been since those backups occurred instead of the actual calendar dates. This makes it easier to tell how long an account has gone without a backup.

Checking *Show detailed status* causes additional lines of information to be displayed for accounts that use certain services, such as the eFolder *BDR for AppAssure* or eFolder *BDR for ShadowProtect* services.

You can sort the list of accounts by clicking the **Sort Order** drop-down menu and selecting the desired field to sort on. The *Customer* field is frequently used to sort the list so you can see how each customer's accounts are performing.

The **Group by account status** checkbox groups accounts by their colored status and then applies the sort order within *each* of the colored status groupings.

Note that when you sort the list by *Customer*, the customer name is not repeated when the next account in the list is assigned to the same customer. This is done to make it easy to distinguish one block of customers from another in the list.

With the list still sorted by customer, let's uncheck the **Group by account status** checkbox. The list is now sorted only by customer name. Notice that the color-coded account status is ignored. Accounts are listed in alphabetical order by customer, irrespective of status.

By default, whenever you enter the Dash Panel from the **Reports** main menu option, the list is sorted by *Customer* and each of the three checkboxes is checked.

The Dash Panel Report has embedded links and icons that indicate whether there are warnings and errors and that display logs and reports, just like with the Account List. For example, clicking the "V" link next to the user name displays the account in the Account List, where you can perform a full range of account management functions on the account. Clicking the "I" link next to the user name impersonates the account so you can perform account management functions that require impersonation, such as changing the account's Contact Information.

Most partners use the Dash Panel Report to quickly see which accounts are in a red or yellow status. They then diagnose the problem by reading the problem description in the right-most column and by clicking the embedded icons and links in the Dash Panel to display reports, logs, and other information.

Let's take a closer look at each of the columns, fields, and icons in the Dash Panel Report.

The first column, labeled "Customer," displays the customer to which the account is assigned, unless the list has been sorted by Customer, in which case the customer name is not repeated when the next account in the list is assigned to the same customer.

The next column, labeled "User Name," displays the user name for the account. This is the name used to login to the Web Portal and is the login ID entered into the Backup Manager, for accounts that use a service that requires the Backup Manager.

This field also displays several embedded icons and links. A status icon is displayed at the beginning of this field. A green checkmark is displayed when there are no warnings or errors currently associated with the account. A yellow triangle icon is displayed when one or more warnings are associated with the account. A red "x" is displayed when one or more errors have been issued to the account. Yellow or red icons indicate that the account requires human attention.

Next, if the **Show detailed status** checkbox has been checked, additional details will be displayed for certain types of accounts. For example, for accounts associated with an AppAssure CORE or AppAssure BDR, detailed status will include information about each of the agents that the AppAssure CORE is backing up (or replicating). You can observe the name of the agent and the last backup (or replication) time for each agent, and, if there are error conditions, you can see whether they are affecting many agents or only a few.

Notice also that vertical bars are used with sub-accounts to show the parent account, if the parent account is in the same grouping when you sort the list.

We have already discussed what the **V** and the **I** links do in this field – they will view or impersonate an account, respectively.

The next column, labeled "Mlbxs" for "mailboxes," displays how many Email Archiving Exchange mailboxes have been provisioned for the account, if this service is being used. Otherwise, a blank is displayed in this field.

The next column, labeled "Disk GB," displays the total disk space used by an account at each backup destination—the cloud, the local server, and the local disk—for accounts that are backing up to multiple destinations. Each destination is displayed on a separate line and is preceded by the corresponding storage-mode icon—the same icons that are used in the Account List. If there is a percentage in parentheses after the number, it indicates that a quota has been set on the account and the percentage of the quota that has been used. In the detailed agent information for AppAssure BDR accounts, the number in brackets represents the GB of protected data (not compressed data) that is associated with that particular agent.

The next column, labeled “Reports,” displays clickable icons for displaying various reports. If an account has never backed up, these icons do not appear, but will appear after the first backup. Moving your cursor over these icons displays a tooltip that further explains the icon.

Use the first two icons to view or download the Summary Report, which displays a graphical look at the backup history for the account.

Use the next two icons to view or download the Last Backup Log, which displays the most recent Backup Log which has been pushed out to the Web Portal by the Backup Manager.

The next icon is for AppAssure BDR accounts and displays the detailed AppAssure CORE status report, including information such as repository size and health, deduplication ratios, task progress, event history, and more.

The **View Backup Settings** icon displays the Backup Manager configuration settings as they existed at the time of the last backup.

Finally, if you bought a BDR from eFolder, the **View Hardware Status** icon displays the status of over 30 different hardware functions of the BDR, such as the temperature of the processor, temperature of the memory chips, fan speed, and so forth.

The next column in Dash Panel Report, labeled “Last Backup,” has a time zone designator as part of the column header that corresponds to the current time zone setting that is in the Contact Information for the account, such as “[EDT]” for Eastern Daylight Time. All times in the Dash Panel Report are displayed using this time zone.

The *Last Backup* column displays the date and time of the last attempted backup, either successful or failed, that was performed on the account. If you checked the *Use friendly dates* checkbox at the top of the page, then the number of days that have passed and the time of day from the last backup are displayed rather than the calendar date. If an account has never backed up, then “never” is displayed in this field.

Clicking the embedded link labeled “V” for “view log” displays the Backup Sessions Report for the account that shows all of the backup sessions performed or attempted on the account. The Backup Sessions Report has a tabular format and uses functionality that is similar to that in the Account List. You can cursor over the column headers to display tooltips that further explain the information displayed in each column.

The next column in the Dash Panel Report, labeled "Last Successful," displays the last successful backup and is formatted in the same way as the *Last Backup* field.

The next three columns display the number of errors, warnings, and commands that were detected by the Backup Manager during the last backup.

The next two columns, labeled "OS" and "Version," display the operating system and version of the operating system of the machine being backed up, as well as the version of the Backup Manager installed on that machine. If an account has never backed up, this field will be blank.

Finally, the *Problem* column displays detailed text describing any problems, warnings, or errors that were encountered with the last backup or conditions that currently exist with the account. Read this text to further understand any issues that exist with the account.

Accounts Reports

The next option in the **Reports** menu, labeled Accounts, displays predefined reports of your accounts, such as all billable accounts, accounts that were recently created, or trial accounts. These reports are displayed using the Account List interface.

For example, selecting *Billable Accounts* displays the Account List with the appropriate search parameters entered into the Advanced Search fields so that only billable accounts are displayed. Notice that the first search line eliminates deleted accounts, the second search line selects only parent accounts, and the third search line eliminates trial accounts. The net result is that only billable accounts are displayed.

The other options in the **Accounts** sub-menu display accounts created within the last two weeks, accounts deleted within the last month, trial accounts created within the last week, accounts that have expired within the last month, accounts that will be expiring within the next month, and accounts that have not backed up within the last week.

Of course, you are not locked into the preconfigured time periods for any of these predefined lists of accounts. For example, if you want to see accounts that were created during the last month instead of the last two weeks, select *Recently Created* on the **Accounts** sub-menu and change the creation date in the search field to be a month ago instead of two weeks ago.

Using the predefined **Accounts** lists saves you the time and trouble of having to create an advanced search yourself. You can easily adjust the time frame for the report after it is displayed.

Billing Reports

The next option in the **Reports** menu, labeled "Billing Reports," displays the *Billing Reports* page, where you can generate Excel spreadsheets that contain detailed resource utilization information that can be used for billing purposes. This same page can be used to access historical billing reports that describe the billable services utilized for any of your past monthly billing periods.

When you are ready to bill your customers, select *Billing Reports* on the **Reports** menu to see the usage information you need to invoice your customers. For more details, refer to the article, *How do I bill my customers?* in the Knowledgebase in the Support Center.

You can use the Billing Reports page to generate billing reports for a single brand, or to generate a zip file containing billing reports for all of your brands, if you have more than one brand. To generate a billing report, first select whether you want to generate an *Invoice Report,* which is suitable for on-screen viewing and printing, a *Raw Account Data Report*, which contains the total disk storage usage information for each parent account, or a *Raw Customer Data Report*, which contains the total disk storage usage information by customer. The latter two raw data reports are useful to partners who have accounting software that can import this type of data.

Finally, select the period the report should cover. You can choose to generate a report showing resource utilization from the beginning of the month until today, or you can choose to download a report from a prior month that was automatically generated on the first of each month. The last month's report is useful because it contains the same information that eFolder uses to bill you, the partner. You can use the information in the last month's report to bill your customers.

For example, let's generate an invoice report for the previous month for a given brand. First, select the desired brand from the **Brand** drop-down menu. Then select *Invoice Report* from the **Report** drop-down menu, select the previous month from the **Period** drop-down menu, click **Download Report**, and open the report after it has been downloaded.

The top of the Invoice Billing Report displays your user name and the date the report was compiled by the system, which will *not* be today's date if the report was generated for a previous month's period. The brand you selected is displayed on the left. Accounts are displayed horizontally, one per row, in the usual manner. A legend on the right indicates that account numbers for sub-accounts are displayed in italic text, inactive accounts are displayed with a light gray background, and deleted accounts are displayed with a dark gray background.

The first tab of the Invoice Report groups accounts by service plan, which is useful because billing rates and fees vary by service plan. Within each service plan, sub-accounts are grouped and are displayed indented under their parent accounts. Rows with an orange and a yellow background display sub-totals for each parent account. These subtotals are provided for parent accounts because eFolder charges partners only for the total cumulative usage for each parent account, not for individual sub-accounts.

Within each service plan, columns or fields are grouped into sections, as indicated by the column headers. The first section, labeled "Account Information," displays the account number, the customer name, and the user name fields.

The next section, labeled "Online Backup," displays the uncompressed disk gigabytes, the compressed disk gigabytes stored in the cloud, and the last backup date.

The third section displays local storage information, for accounts that are backing up data to a local disk or local server. The first column in this section shows whether the local storage that is being used is billable. You are charged for local storage for a customer when that customer is storing more than five times locally than what they are storing in the cloud. If this condition occurs, you are charged a flat fee for each server or workstation than has more than five times the amount of data backed up locally as it has backed up to the cloud.

The fourth section, labeled "Exchange Archiving," applies to accounts that are also using the Email Archiving add-on service. This section displays the number of billable mailboxes and the last status update, detailing if the service is active or not.

The next section, labeled "ShadowProtect," applies to accounts using the ShadowProtect BDR service. It displays the number of servers and desktops that are being backed up to the ShadowProtect BDR.

The final section, which is unlabeled, displays when the account was created and when it was deleted, if it has been deleted.

In addition to this summary worksheet in the spreadsheet, there is an additional summary worksheet for each service plan you are using that will show a summary of the resources utilized for all accounts with a given service plan within each of your brands. For example, you could have the tab "Select Summary" that displays how much cloud storage all of your *Select* accounts are using for each of your brands.

Additionally, if you are purchasing third-party software from eFolder, such as StorageCraft ShadowProtect, there will also be one or more worksheets that detail all of the license keys that are active and what the current activation counts are.

Backup Sessions Report

The next option in the **Reports** menu, labeled "Backup Sessions," displays a historical listing of all of your backups for all of the accounts in your brand. Every time an account backs up, the results of the backup session are recorded in a backup session record. The Backup Sessions Report displays a list of these records.

Use this report to view the history of backups for one or more accounts, to see how much data was uploaded, and to see how many errors were generated and what the errors were. Because this report displays the backup session records for *all* of the accounts in your brand, it can be quite long and can therefore be slow to load. Normally you would only display this report for a single account by right clicking on an account in the Account Center, selecting *Reports*, and selecting *View Online Backup Session Report,* or, if you are in the Account List, by clicking the "V" link in the *Last Backup* column for that account.

The Search Criteria section at the top of this report is similar to the Advanced Search functions in the Account List. Use it to display specific backup sessions records that match your search criteria.

When you first display the Backup Sessions Report, the results of the last search you performed are displayed in tabular format in the Backup Sessions Matching Search Criteria section. If no previous search has ever been conducted, then backup sessions for all of your accounts are displayed. Otherwise, the list displays the matching accounts for the search you recently performed. Again, usually you will be viewing this report only for a single account, and the search criteria will be filled in for you already.

Use the display fields at the top of this list to control how many accounts you want to display and where in the list you want the display to begin. By default, the Backup Sessions report displays a history of backups for the last two weeks, but you can change that to a different time period by entering new parameters into these fields, after the report has loaded.

Click the **Refresh** button at any time to update the report with the latest information. Click the **View Older Sessions** button to display sessions that are for an older time period.

Let's look at some of the column labels in this report that are different from those in the Account List. The *Type* field indicates what type of session was initiated: "B" for an online backup, "LNB" for a network server backup, "LDB" for local disk backups, "A" for an authentication-only session, and "R" for a restore session. The *Upload BW* and *Download BW* fields display how much bandwidth was used during the session. The *Num Commands* field displays how many commands were issued by the Backup Manager during the backup session. The *Num Uploads* field displays the number of files that were uploaded during the session. The *Num Downloads* field displays the number of files downloaded during the session.

The *Num Destroyed* field displays how many files were permanently destroyed during the session. The *Cli Warns*, *Cli Errors*, and *Cli OK* fields display the number of warnings, errors, and action events that took place inside of the Backup Manager software during the session. The *IP Address* field displays the address of the computer that connected to the eFolder cloud to initiate the session. The *Client ID* field displays a unique identifier of the device that connected, which includes the hostname of the machine. And finally, the *Client Version* field displays the version of the Backup Manager that initiated the session. All of the other fields on the Account List have been discussed in other training videos.

Active Backup Sessions Report

The next option in the **Reports** menu, labeled "Active Backup Sessions," displays only accounts that are currently backing up data at the moment the report was generated. Only accounts that started backing up within the last week are included. The layout of this report is the same as the layout of the Backup Sessions Report. See that section of this video for further information.

Event Log

The next option in the **Reports** menu, labeled "Event Log," displays a list of the events that have occurred across all of your accounts from the time each account was created. Events are occurrences such as finished backups (with or without errors), notifications sent, or a new sub-account being created under the account. An event is anything that occurred that is associated with the account except changes to the account itself, which are recorded in the Audit Log.

Most partners prefer to view the Event Log for a single account from the Account Center or Account List, using the functions or embedded links in those lists.

Because the Event List can be quite long, it may take a few seconds to display. By default, the latest events are shown at the top of the list, but you can sort the list by clicking any of the column names that are displayed with an underscore across at the top of the list. You can also search the list to find only events that match your chosen search criteria using the Search box at the top of the Event Log. The Quick Search and Advanced Search functions on this page are identical to those in the Account List and will not be further explained in this video.

Each event in the Event Log is either an okay event, a warning event, or an error event, as indicated by the green checkmark, yellow triangle, or red "x" that are displayed in the first column.

The other columns in the Event Log indicate when the event occurred, the user name of the account for which the event occurred, and the event information. The *Details* link embedded in the Event Information column displays the detailed information for the event, such as the notification text that was generated and emailed when the event occurred. The *Notifications* link displays when the notification was sent and to whom it was sent. The *Reprocess Notifications* link will cause the system to process any notification rules that match this particular event. This can be useful when testing PSA integrations or when you want to be sure that the partner alerting rules you have setup operate the way that you expect them to operate.

For longer event lists, click the drop-down menu on the right to control how many events are displayed at a time, and then use the page display links to navigate through the list.

Audit Log

The *Audit Log* option under the Reports menu displays a list of the changes that were made to your accounts, such as changing a password or the service plan of an account. This list is displayed in tabular format as usual with one event listed per row. The columns of the table show when the event occurred, who performed the action (or attempted to perform the action), the user name of the account on which the action was performed, the action that was taken or attempted, and any messaging data that was associated with the event.

Each event is either an okay event, a warning event, or an error event, as indicated by the green checkmark, yellow triangle, or red "x" that are displayed in the first column. For events marked with a red "x," an explanation of why the action failed is displayed in red text in the *What Happened* column. Because the Audit Log can be quite long, it may take a few seconds to display.

By default, the latest entries are shown at the top of the list, but you can sort the list by clicking any of the column names that are underscored at the top of the list. You can search and sort the list in the same way you do in the *Event Log*. Most partners prefer to view the Audit Log for a single account from the Account Center or Account List, using the functions and embedded links in those lists.

Clicking the V link in this field displays the Account List for the user who took the action. Click the V link in the *Target* field displays the Account List for the user whose account was affected. Note that if a change to an account was performed by an eFolder employee, the word "hidden" is displayed in the *Who Did It* field.

For longer lists, click the drop-down menu on the right to control how many events are displayed at a time, and then use the page display links to navigate through the list.

Thanks for watching this video on viewing reports in the Web Portal. Please see the other video overviews and how-to videos in this series for additional training on partner-related tasks.