HP OpenView Select Audit

For the Windows®, HP-UX®, and Linux® Operating Systems

Software Version: 1.01

User Guide

Document Release Date: November 2006
Software Release Date: November 2006

i n v e n t

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Contents

1 Introduction

HP OpenView Select Audit is part of HP's business service Identity Management suite. Select Audit provides reporting, monitoring, and alerting capabilities to facilitate risk assessment and breach response processes. It outputs data to multiple destinations including databases and files. Different output destinations can be configured based on the type of audit data, such as audit component (administration session, authentication, access query) and event level (information, warning).

The Audit Portal is used to perform various tasks in Select Audit. The tasks available are determined by the type of user you are: an administrator, a user or an auditor. This guide discusses user and auditor tasks. Administrators should refer to the *HP OpenView Select Audit 1.0 Administration Guide* for more information.

Audience

This guide is for two types of users. Chapter 2 is intended for users who are required to view, run and approve reports. Chapter 3 is intended for auditors who are responsible for reviewing reports and data, and verifying the integrity of the controls. Chapter 4 is of interest to both types of users. This guide assumes a working knowledge of:

- Audit concepts and requirements
- The audit life cycle and regulatory compliance requirements
- The reporting requirements of your company's operational and audit policies

The Select Audit Documentation Set

The Select Audit Documentation Set

This manual refers to the following Select Audit documents. These documents are installed with Select Audit and are available in the `<install_path>/docs` folder where `<install_path>` represents the path where Select Audit is installed.

- *HP OpenView Select Audit 1.01 Administration Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`administration_guide.pdf`).
- *HP OpenView Select Audit 1.01 Installation Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`installation_guide.pdf`).
- *HP OpenView Select Audit 1.01 User's Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`user_guide.pdf`).

- *HP OpenView Select Audit 1.01 Sarbanes-Oxley Model Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`sb_model_guide.pdf`)
- *HP OpenView Select Audit 1.01 Concepts Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`concepts_guide.pdf`)
- *HP OpenView Select Audit 1.01 Report Center User's Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`rpt_center_guide.pdf`)
- *HP OpenView Select Audit 1.01 Report Designer's Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`rpt_design_guide.pdf`)
- *HP OpenView Select Audit 1.01 Report Developer's Guide*, © Copyright 2006 Hewlett-Packard Development Company, L.P. (`rpt_devel_guide.pdf`)

Online help is available with the Audit Portal.

Chapter Summary

This guide includes the chapters listed in Table 1.

➤ See the *HP OpenView Select Audit 1.01 Release Notes* (`relnotes.pdf`) on the Select Audit installation CD for known installation issues at the time of this release.

Table 1 Guide Overview

Chapter	Description
Chapter 1, Users	This chapter describes the Audit Portal features users can access.
Chapter 2, Auditors	This chapter describes the Audit Portal features for auditors.
Chapter 3, Using Reports in Select Audit	This chapter describes the features of the reporting tools in Select Audit. Reports are viewed, scheduled and modified using the Report Center.

1 Users

Select Audit is accessed via the Audit Portal. The Audit Portal is used to access the Report Library and approve reports. Users can perform the following tasks in Select Audit:

- View reports
- Run reports
- Approve reports
- Receive alerts and notifications
- View user activity reports filtered by service

Select Audit supports the following browsers:

- Internet Explorer 6
- Firefox

This chapter includes the following topics:

- Starting Select Audit on page 10
- Audit Portal Features on page 11
- Approving Reports on page 15

Starting Select Audit

1. Open a web browser and enter the following URL:

```
http(s)://<host>:<port>/auditportal/
```

where <host> is the host name of your WebLogic server and <port> is its port number. The **Select Audit Login** page appears.

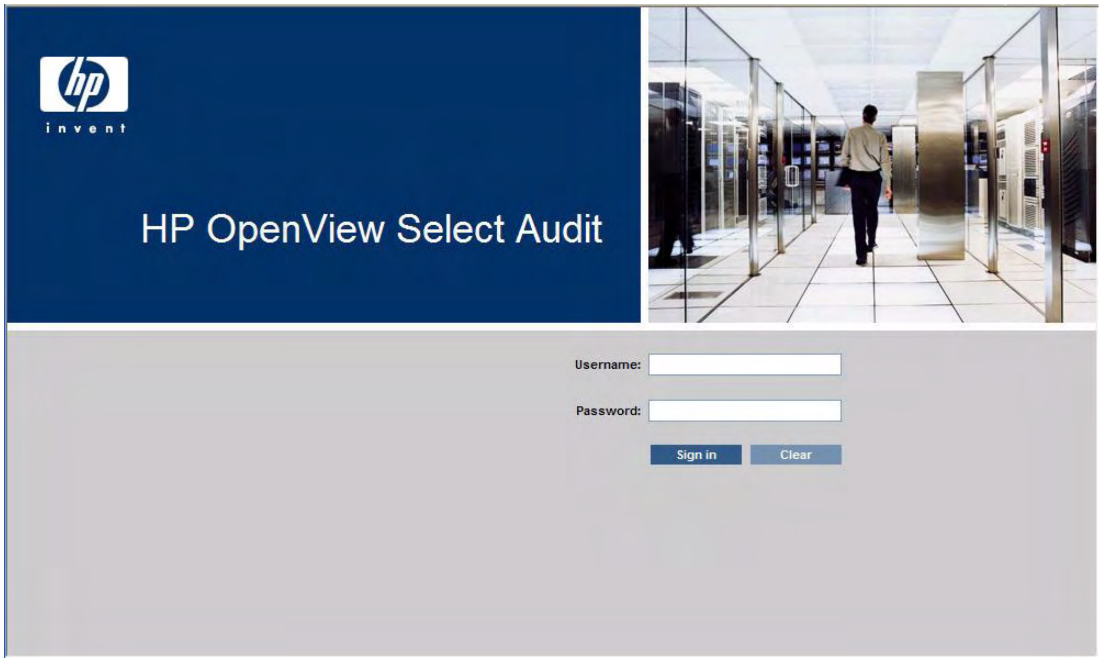


Figure 1 Select Audit Login Page

If you are using Select Audit with a Select Access integration, the following screen appears.

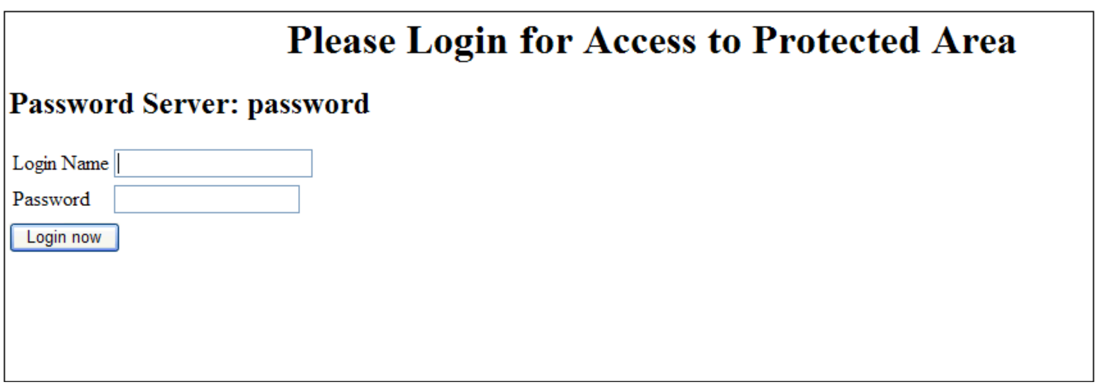


Figure 2 Select Audit/Select Access Integration Login Page

2. Enter your Select Audit username and password in the appropriate fields and click **Sign In**. The **Select Audit Portal** appears.

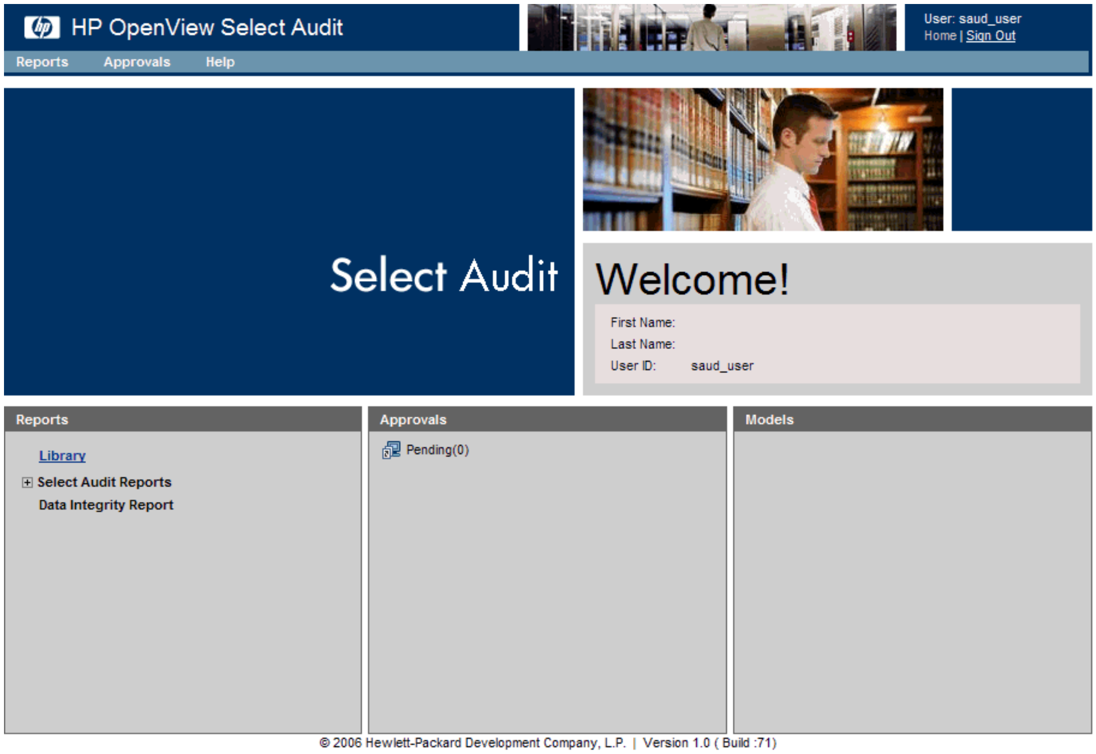


Figure 3 Select Audit User Portal

Audit Portal Features

The Audit Portal is divided into two regions. There is a toolbar at the top of the Portal. The lower portion of the Portal is divided into three workspaces: **Reports**, **Approvals**, and **Models**. The toolbar and the workspaces are described below.

Portal Toolbar

The Portal toolbar is used to perform user tasks in Select Audit. It has three menus: **Reports**, **Approvals** and **Help**.

Figure 4 Audit Portal User Toolbar

The menus are described in Table 2.

Table 2 User Toolbar

Menu item	Description
Reports	The **Reports** menu has three entries: **Library**, **My Reports** and **Search**. Clicking any of these menu items opens the **Report Center**. The Reports menu items are described below: • Library opens the Report Library in the Report Center. In the Library, you can upload reports to the Report Server. • My Reports opens the My Reports area of the Report Center, which displays the contents of the application server's My Reports folder. From here you can run, publish and schedule reports. You can also generate Ad Hoc reports using the Ad Hoc wizard. • Search opens the Search engine in the Report Center. You can search for reports using any or all of the criteria listed. For detail information about using the Report Center, refer to *HP OpenView Select Audit 1.01 Report Center User's Guide*.
Approvals	The **Approvals** menu is used to view pending approvals assigned to you. See Approving Reports on page 15 for more information about approving reports.
Help	The **Help** menu is used to access online help for Select Audit. It also contains copyright and version information. Users and Auditors should use the **User Guide** menu item for information about topics in this guide.

Workspaces

The lower part of the Portal is divided into three workspaces: **Reports**, **Approvals** and **Models**.

Reports workspace

The **Reports** workspace is displayed on the left-hand side of the lower portion of the Audit Portal.

Figure 5 Report Workspace

The Reports workspace provides quick access to commonly-used report features:

- **Library** opens the Library in the Report Center.
- **Select Audit Reports** expands to show a list of the most frequently-used Select Audit reports.
- **Data Integrity Report** expands to show the most recent run time for the Data Integrity report. It has links to the Data Integrity report, the Data Integrity Data Errors report and the Data Integrity Signature Errors report.

Approvals workspace

The **Approvals** workspace is displayed in the center of the lower portion of the Audit Portal.

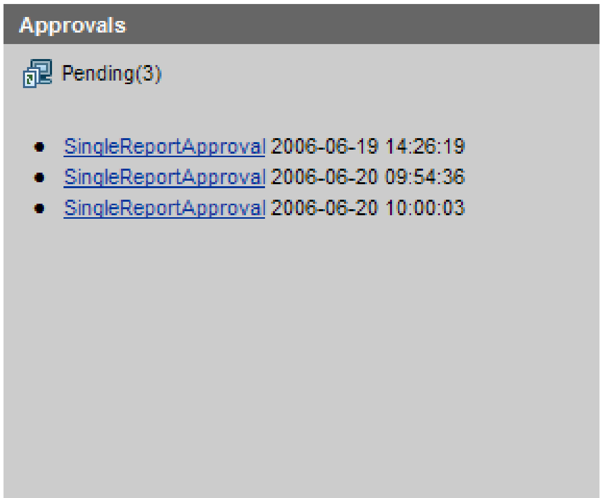


Figure 6 Approvals Workspace

The Approvals workspace provides quick access to your pending report approvals. When you click a report name, the report opens in the browser. See Approving Reports on page 15 for more information about approving reports.

Models workspace

The **Models** workspace is displayed on the right-hand side of the lower portion of the Audit Portal. It is empty because users cannot view model information.

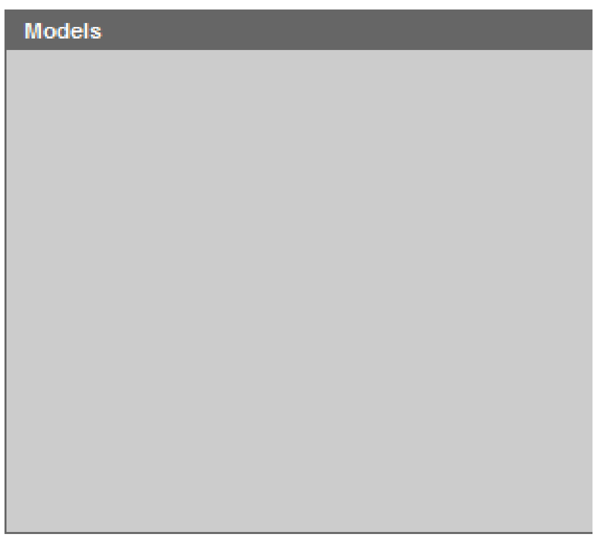


Figure 7 Models Workspace

Using Select Audit

Users can perform the following tasks in Select Audit:

- approve reports
- view and run reports using the Report Center

Report approval is described below. For more information about using the Report Center, see Chapter 3, Using Reports in Select Audit.

Approving Reports

You can approve reports awaiting your approval, and view reports you have approved or rejected using the **Approvals** menu.

1 Click **Approvals** → **My Pending Approvals**. The **Workflow List** screen appears as shown in Figure 8.

➤ Click **Approved** or **Rejected** to see a list of approved or rejected reports. Click **Show All** to see all reports with approval requests.

➤ You can sort the Workflow List by Workflow Approval Status or Time/Date Initiated.

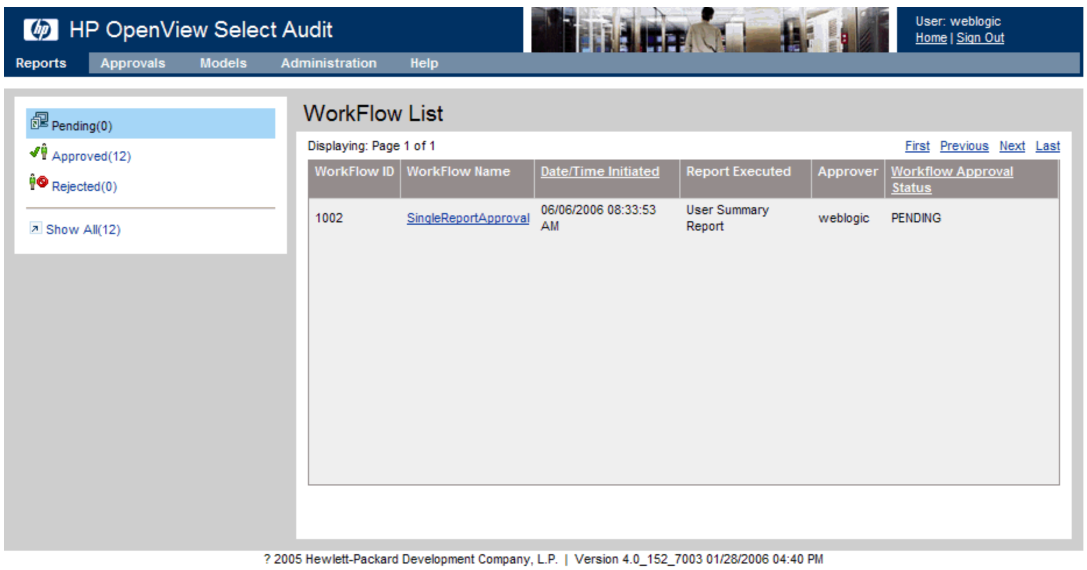


Figure 8 Workflow List Screen

2 Click the report you wish to approve. The report appears in the browser.

➤ You can view the report in a new window by clicking **Open report in separate window** on the report.

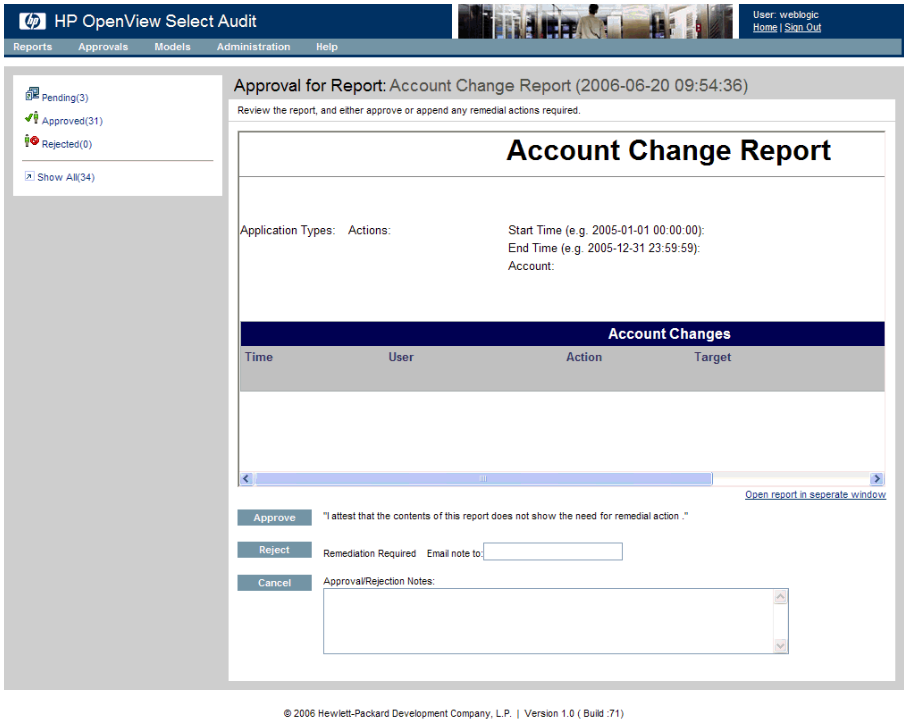


Figure 9 Sample Report Approval

3 Click **Approve** to approve the report or click **Reject** to send the report back for remedial action.

➤ You can send a note with the rejection by entering an email address in the **Email note to:** field.

2 Auditors

In Select Audit, auditors can perform additional tasks to the user tasks. There are two types of auditors: internal auditors and external auditors.

Internal auditors can:

- View regulation-specific reports
- Schedule pre-defined reports
- View pre-defined reports
- Monitor the dashboard
- Receive audit-specific alerts and notifications
- Participate in the audit process workflow (approval, remediation)
- Respond to notifications

External auditors perform the same functions as internal auditors but also audit internal audit groups. In addition to the internal auditor tasks, they can:

- Create Ad Hoc reports
- Review raw data
- Check data for tampering
- View all reports seen by internal auditors

Select Audit supports the following browsers:

- Internet Explorer 6
- Firefox

This chapter describes the features that are available to users with Auditor permissions, as well as the standard user features. It includes the following topics:

- Starting Select Audit on page 18
- Audit Portal Features on page 19
- Using Select Audit

Starting Select Audit

1 Open a web browser and enter the following URL:

```
http(s)://<host>:<port>/auditportal/
```

where <host> is the host name of your WebLogic server and <port> is its port number. The **Select Audit Login** page appears.

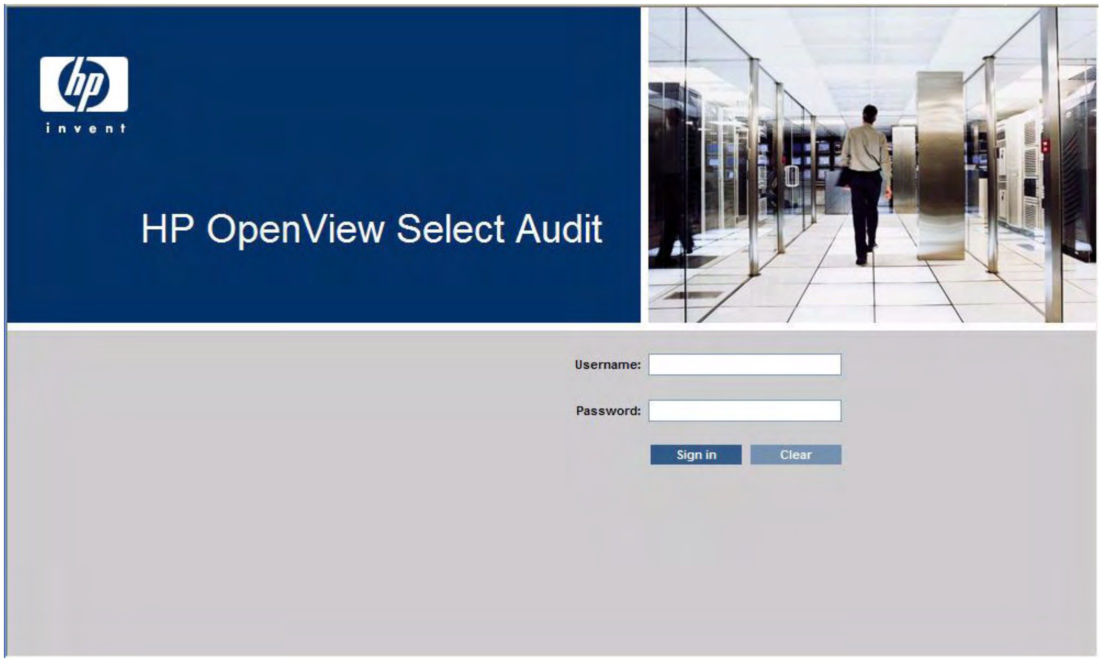


Figure 10 Select Audit Login Page

If you are using Select Audit with a Select Access integration, the following screen appears.

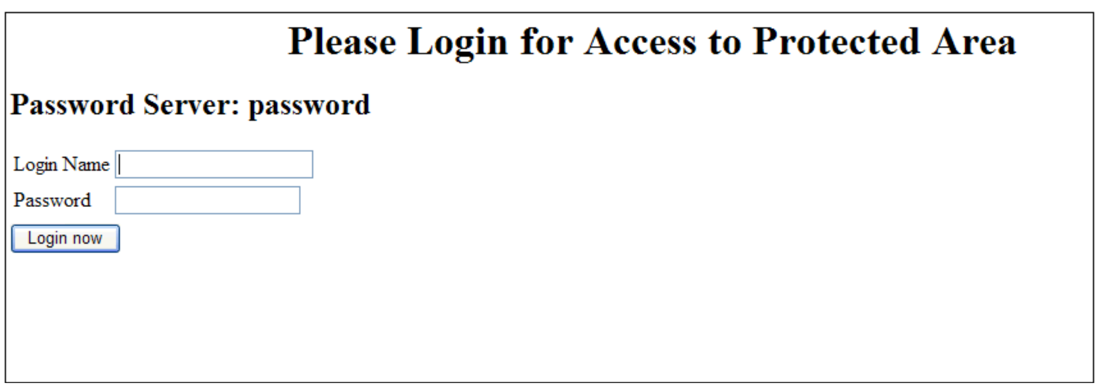


Figure 11 Select Audit/Select Access Integration Login Page

2 Enter your Select Audit username and password in the appropriate fields and click **Sign In**. The **Select Audit Portal** appears.

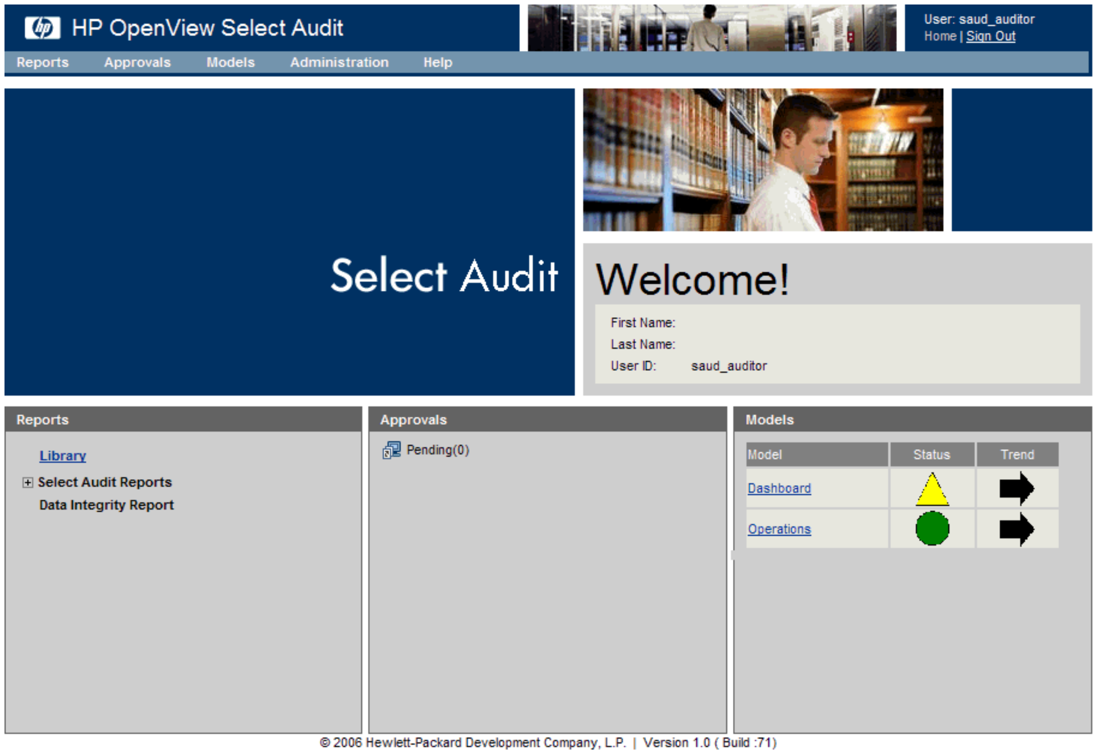


Figure 12 Select Audit Auditor Portal

Audit Portal Features

The Audit Portal is divided into two regions. There is a toolbar at the top of the Portal. The lower portion of the Portal is divided into three workspaces: **Reports**, **Approvals**, and **Models**. The toolbar and the workspaces are described below.

Portal Toolbar

The Portal toolbar is used to perform Auditor tasks in Select Audit. Auditors can access five menus: **Reports**, **Approvals**, **Models**, **Administration** and **Help**.

Figure 13 Audit Portal Auditor Toolbar

The menus are described in Table 3.

Table 3 Auditor Toolbar

Menu item	Description
Reports	The **Reports** menu has three entries: **Library**, **My Reports** and **Search**. Clicking any of these menu items opens the **Report Center**. The Reports menu items are described below: • Library opens the Report Library in the Report Center. In the Library, you can upload reports to the Report Server. • My Reports opens the My Reports area of the Report Center, which displays the contents of the application server's My Reports folder. From here you can run, publish and schedule reports. You can also generate Ad Hoc reports using the Ad Hoc wizard. • Search opens the Search engine in the Report Center. You can search for reports using any or all of the criteria listed. For detail information about using the Report Center, refer to *HP OpenView Select Audit 1.01 Report Center User's Guide*.
Approvals	The **Approvals** menu is used to view pending approvals assigned to you. See Approving Reports on page 23 for more information about approving reports.
Models	The **Models** menu has two standard submenus: **Overview** and **Operations**. It also contains submenus for any loaded compliance models. • Overview opens the high-level view of the currently-loaded models in a new browser window. • Operations opens the **Operations** folder in the Report Center.
Administration	The **Administration** menu is used verify the integrity of data.
Help	The **Help** menu is used to access online help for Select Audit. It also contains copyright and version information. Users and Auditors should use the **User Guide** menu item for information about topics in this guide.

Workspaces

The lower part of the Portal is divided into three workspaces: **Reports**, **Approvals**, and **Models**.

Reports workspace

The **Reports** workspace is displayed on the left-hand side of the lower portion of the Audit Portal.

Figure 14 Report Workspace

The Reports workspace provides quick access to commonly-used report features:

- **Library** opens the Library in the Report Center.
- **Select Audit Reports** expands to show a list of the most frequently-used Select Audit reports.
- **Data Integrity Report** expands to show the most recent run time for the Data Integrity report. It has links to the Data Integrity report, the Data Integrity Data Errors report and the Data Integrity Signature Errors report.

Approvals workspace

The **Approvals** workspace is displayed in the center of the lower portion of the Audit Portal.

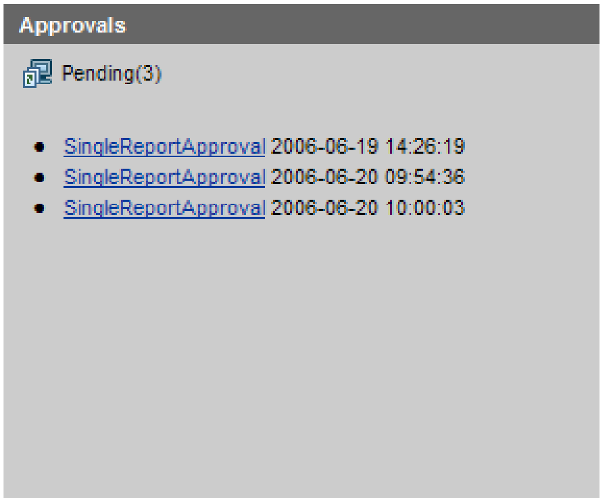


Figure 15 Approvals Workspace

The Approvals workspace provides quick access to your pending report approvals. When you click a report name, the report opens in the browser. See Approving Reports on page 23 for more information about approving reports.

Models workspace

The **Models** workspace is displayed on the right-hand side of the lower portion of the Audit Portal.

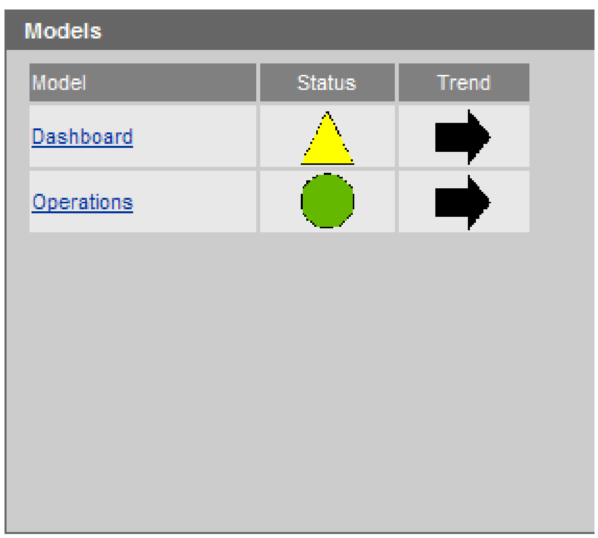


Figure 16 Models Workspace

The Models workspace displays a high-level view of the currently-loaded models, showing the status and trend. See Working with Models on page 26 for more information about Select Audit models.

Using Select Audit

Auditors can perform the following in Select Audit:

- approve reports
- verify data integrity
- view the model status, trend and reports
- view and run reports using the Report Center

The first three tasks are described below. For more information about using the Report Center, see Chapter 3, Using Reports in Select Audit.

Approving Reports

You can approve reports awaiting your approval, and view reports you have approved or rejected using the **Approvals** menu.

1 Click **Approvals** → **My Pending Approvals**. The **Workflow List** screen appears as shown in Figure 17.

➤ Click **Approved** or **Rejected** to see a list of approved or rejected reports. Click **Show All** to see all reports with approval requests.

➤ You can sort the Workflow List by Workflow Approval Status or Time/Date Initiated.

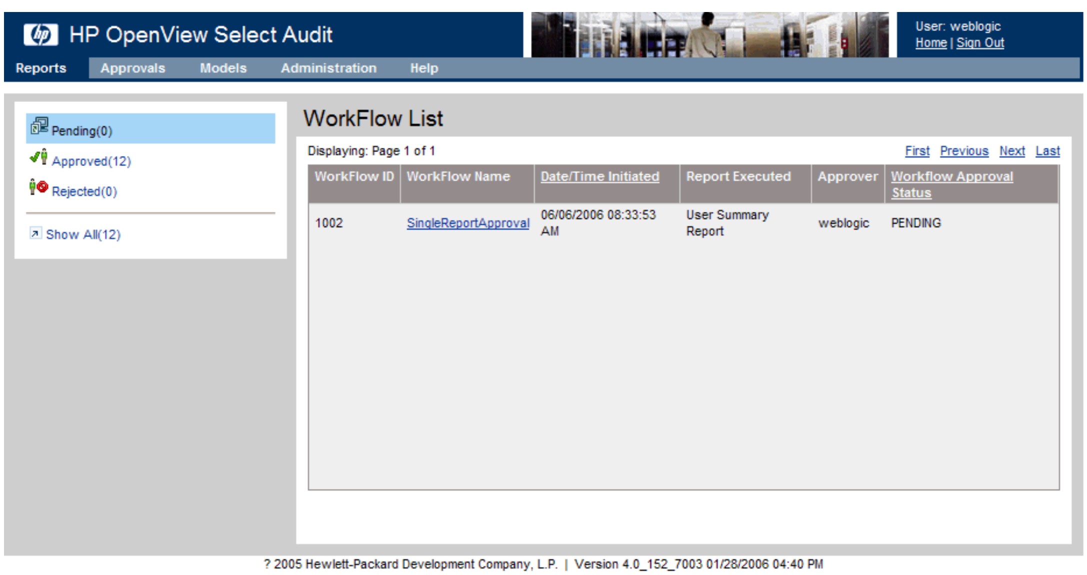


Figure 17 Workflow List Screen

2 Click the report you wish to approve. The report appears in the browser.

➤ You can view the report in a new window by clicking **Open report in separate window** on the report.

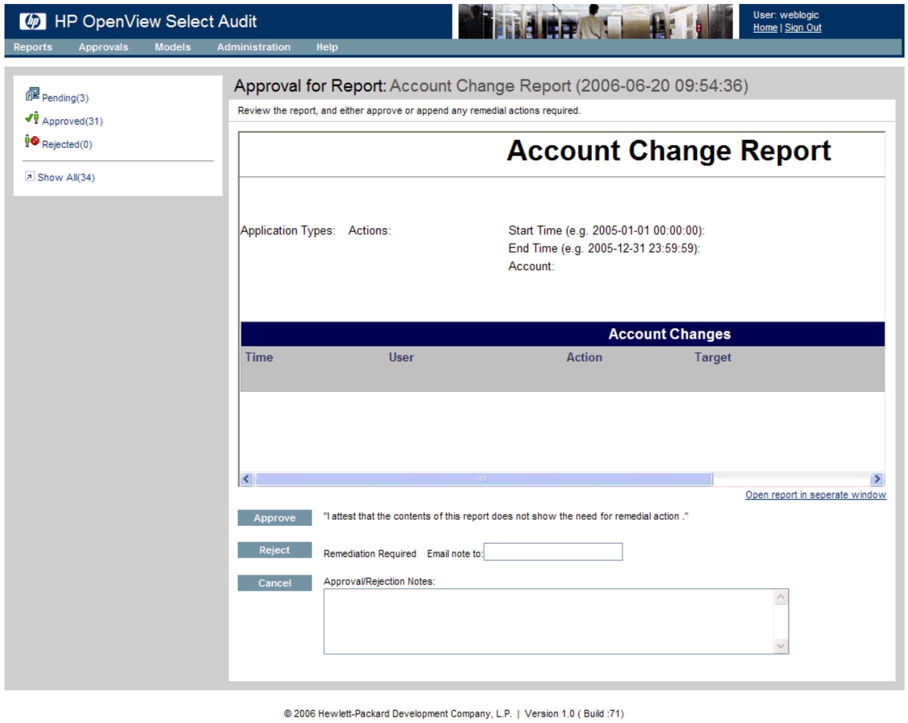


Figure 18 Sample Report Approval

3 Click **Approve** to approve the report or click **Reject** to send the report back for remedial action.

➤ You can send a note with the rejection by entering an email address in the **Email note to:** field.

Verifying Audit Data Integrity

You can verify data integrity, and the run the Data Integrity report in the Audit Portal.

1 Select **Administration** → **Verify Audit Data Integrity**. The **Data Verification** screen appears.

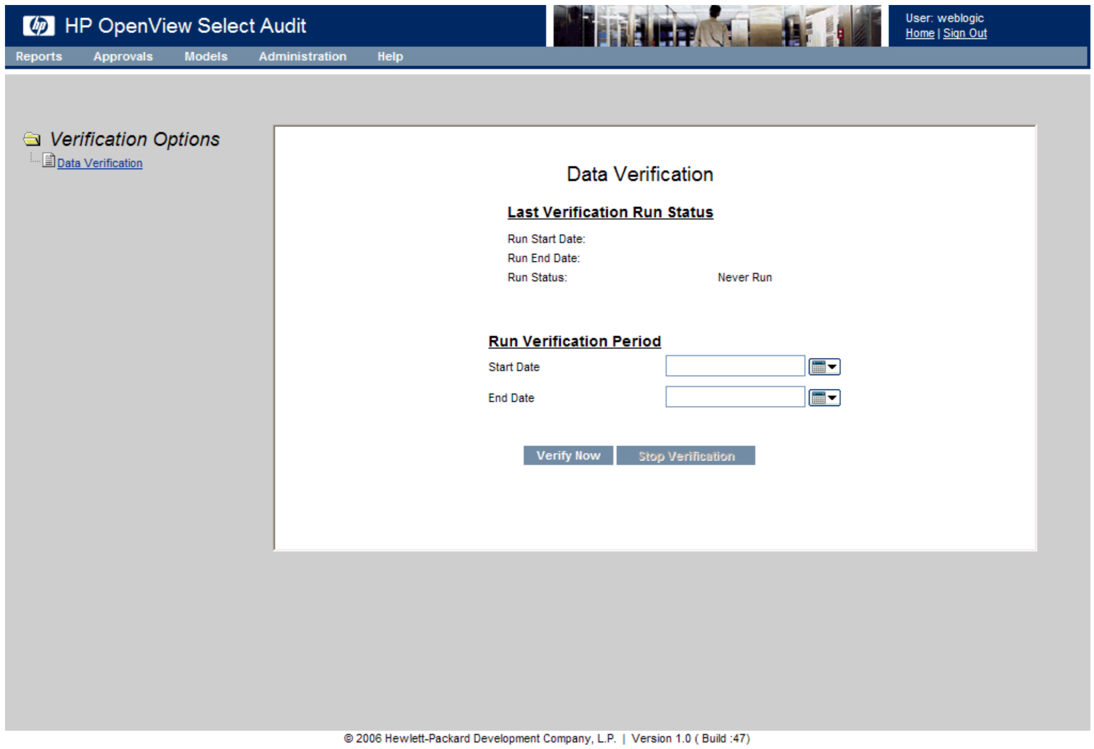


Figure 19 Data Verification Screen

This screen is used to specify date parameters for running data verification. The **Last Verification Run Status** section displays the run start and end date, and status of the last run data verification.

2 Enter a **Start Date** and an **End Date** manually or by using the calendars.

You can also specify start and end times in addition to the date by typing the value in the appropriate fields after the date.

3 Click **Verify Now**. The message "Verification is successfully executing" appears at the top of the screen to indicate that data verification is running.

The **Data Integrity** report is displayed in the **Select Audit Reports** folder of the Report Center.

Working with Models

The **Models** menu is used to obtain a high-level view of the loaded models and to view compliance reports generated by the loaded compliance models. The Operations model is included with the Audit Server upon installation. The compliance models are optional add-ons. For this release, only the Sarbanes-Oxley (COBIT) compliance model is available. Additional compliance models will be available in later releases.

Overview

The model overview is a high-level view of the currently-loaded models. Click **Models** → **Overview** on the toolbar. The **Models Overview** screen appears.

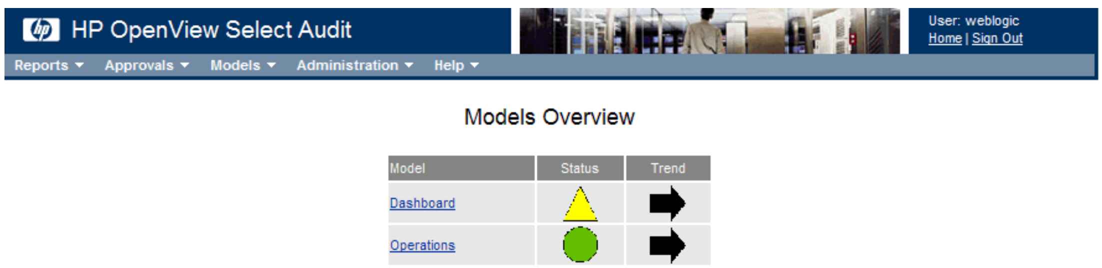


Figure 20 **Models Overview Screen**

Operations model

The Operations model captures and analyzes normal operations data. You can view reports that show the status of the system, as well the trend of the status and the history of the status. The model is run four times a day at 1:00 am, 7:00 am, 1:00 pm and 7:00 pm (based on the machine time).

Model reports

The **Operations** folder, under the **Models** folder in the Report Center Library contains reports generated by the Operations model.

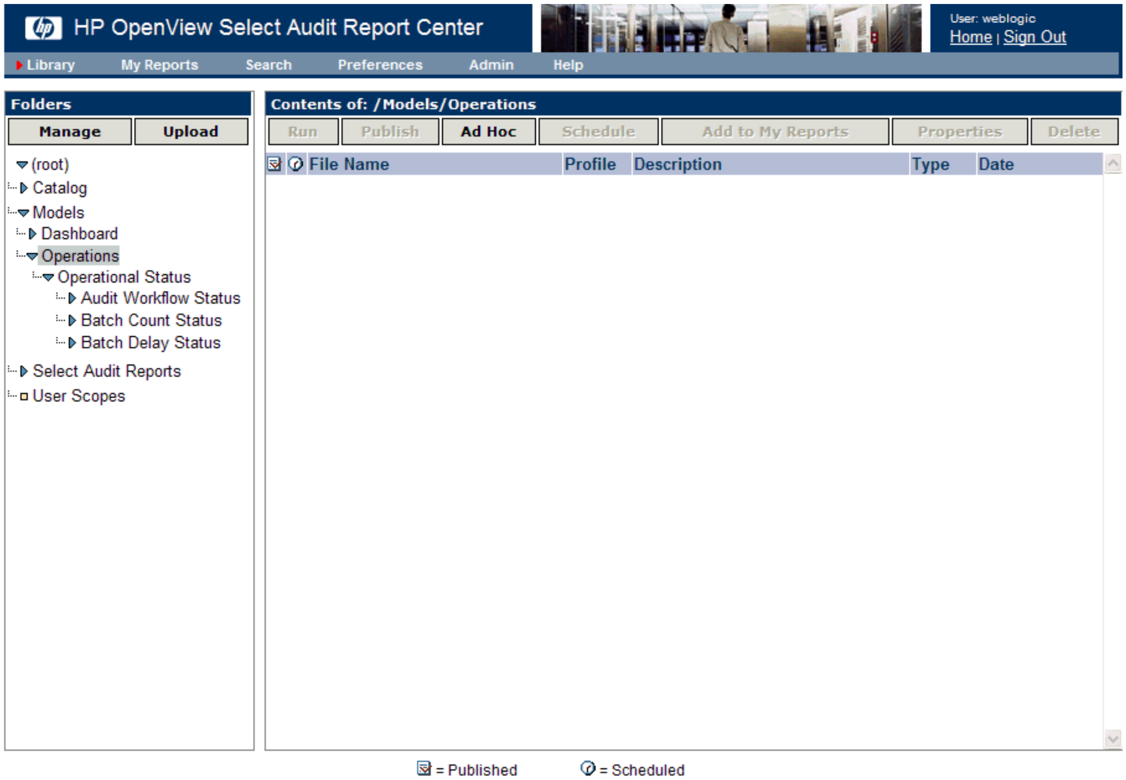


Figure 21 Operations Model Reports Folder

The Operations reports are categorized in the Operational Status subfolder. You can drill down through the subfolder to view smaller levels of data. The Operations reports are run four times a day at 1:00 am, 7:00 am, 1:00 pm and 7:00 pm (based on the machine time).

The report data is represented in a tree structure and shows the results of the analysis of the model node fact data.

Model report structure

The model reports show the status, trend and status history of a metric. An example of a model report is shown in Figure 22.

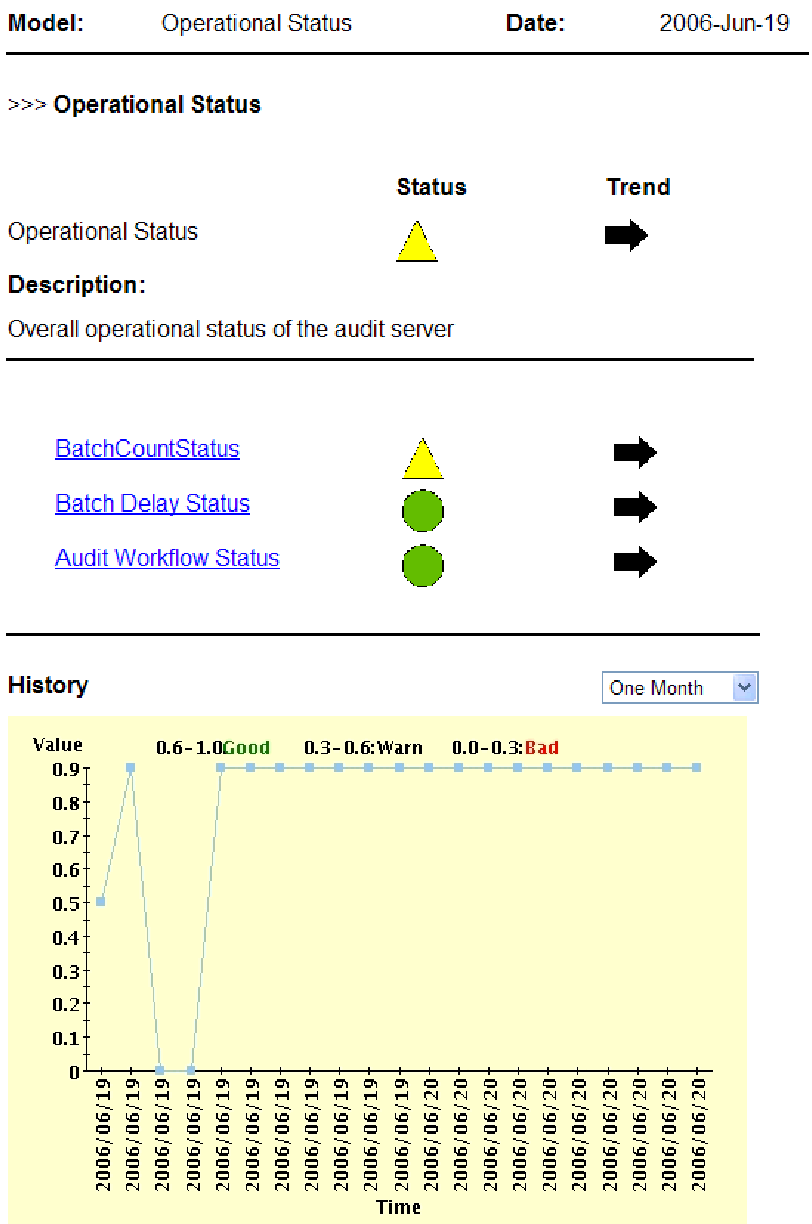
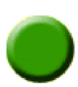
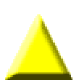
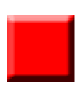


Figure 22 Sample Model Report

The level of the current report is shown at the top of the report, along with the model name and the date the report was generated. The body of the report is divided into two sections. The top section of the report shows the metric being represented, its status and the trend. Status of the level of compliance with the defined control objectives is shown by a status indicator:

 compliance level is good

 compliance level is adequate

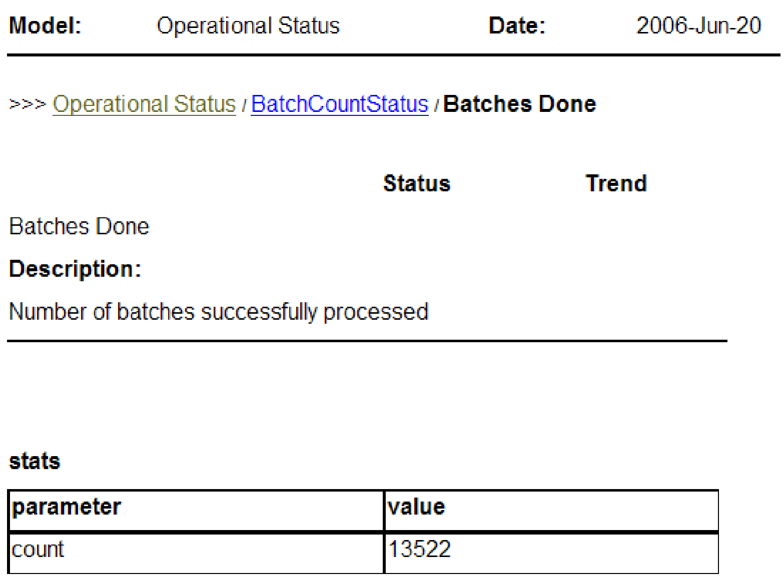
 compliance level is poor

The status is calculated from the child nodes and is determined by the lowest level of any child node. For example, if a child node is red, the top-level status will be red, even if all other child nodes are green.

The trend of the level of compliance is shown by arrows:

- improving level of compliance
- compliance level staying the same
- declining level of compliance

The child nodes are listed under the report metric. You can click the child node name to drill down to reports for those nodes. Some child node reports do not have show a status or trend, as shown in Figure 23.



Model: Operational Status **Date:** 2006-Jun-20

>>> Operational Status / BatchCountStatus / **Batches Done**

	Status	**Trend**
Batches Done		

Description:

Number of batches successfully processed

stats

parameter	value
count	13522

Figure 23 Model Report Without Status

These reports show low-level data elements that compute the model data using data directly from the database. The output and parameters of the element are listed in the Stats table.

History status

The bottom section of the model report shows the status history. The status history is recorded each time the model runs. The graph maps status values over a period of time. The X axis shows the time period which is set using the drop-down list at the top of the graph. The following time periods are available:

- One Month
- Three Months
- Half Year
- One Year

The Y axis represents a scale of “goodness” between 0 and 1, where 0 is red and 1 is green for that particular node.

Deleting model reports

You can delete model reports using the Report Center. If you want to delete model reports, you must delete all the reports at each level. Deleting an upper-level report does not automatically delete related reports at a lower level.

When you delete a model from the Audit Server, the reports generated by that model are not deleted.

3 Using Reports in Select Audit

This chapter describes the features of the reporting tools in Select Audit. Reports are accessed via the **Reports** menu on the Select Audit toolbar.

➤ You can also access reports using the **Reports** workspace.

For more detailed information about report creation and design, refer to the *HP OpenView Select Audit 1.01 Report Center User's Guide*.

Reports are viewed, scheduled and modified using the Report Center. This chapter contains the following topics:

Using the Report Center

The Report Center is used to view, print, and schedule reports. It is also used to administer the Library. You can use the Report Center to upload files, control security using J2EE (WebLogic) security, schedule reports, and monitor performance.

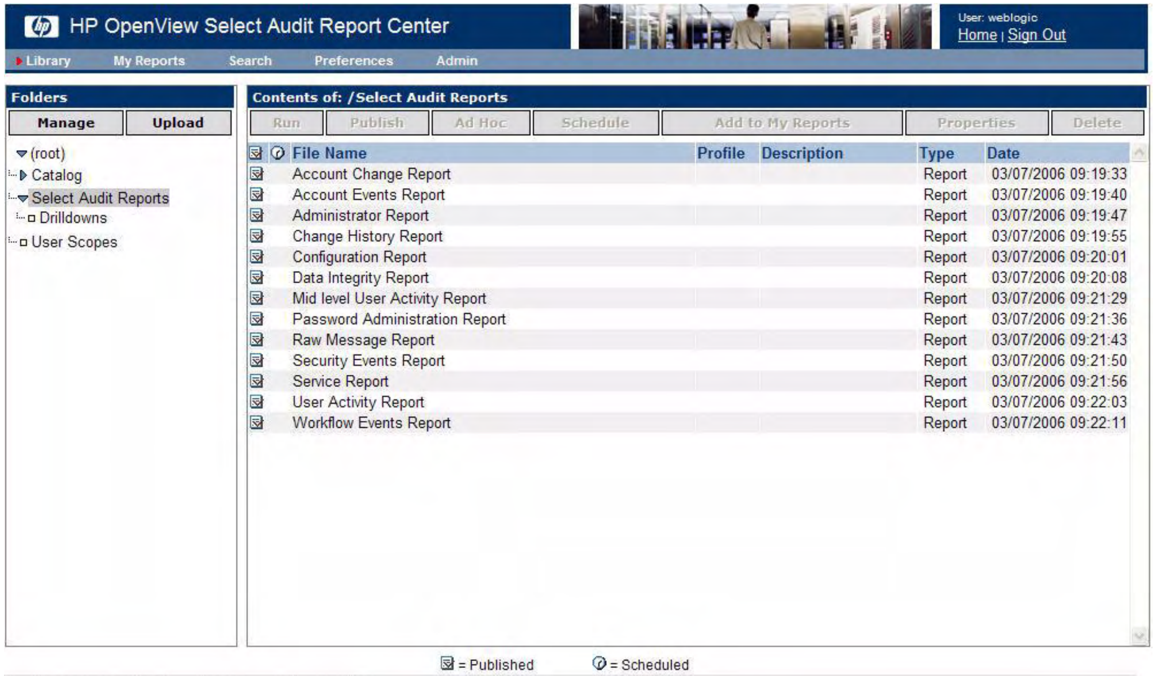


Figure 24 Report Center

The Report Center has four main sections:

Table 4 Report Center Sections

Section	Description
Library	Use the Library to access and arrange the reports on the Report Server.
My Reports	My Reports provides a shortcut to frequently-viewed reports.
Search	Use Search to locate files in the Library by name, type or description.
Preferences	Preferences is used to set user preferences, such as your start page.

Using My Reports

You can save frequently-viewed reports and customized reports in the **My Reports** folder.

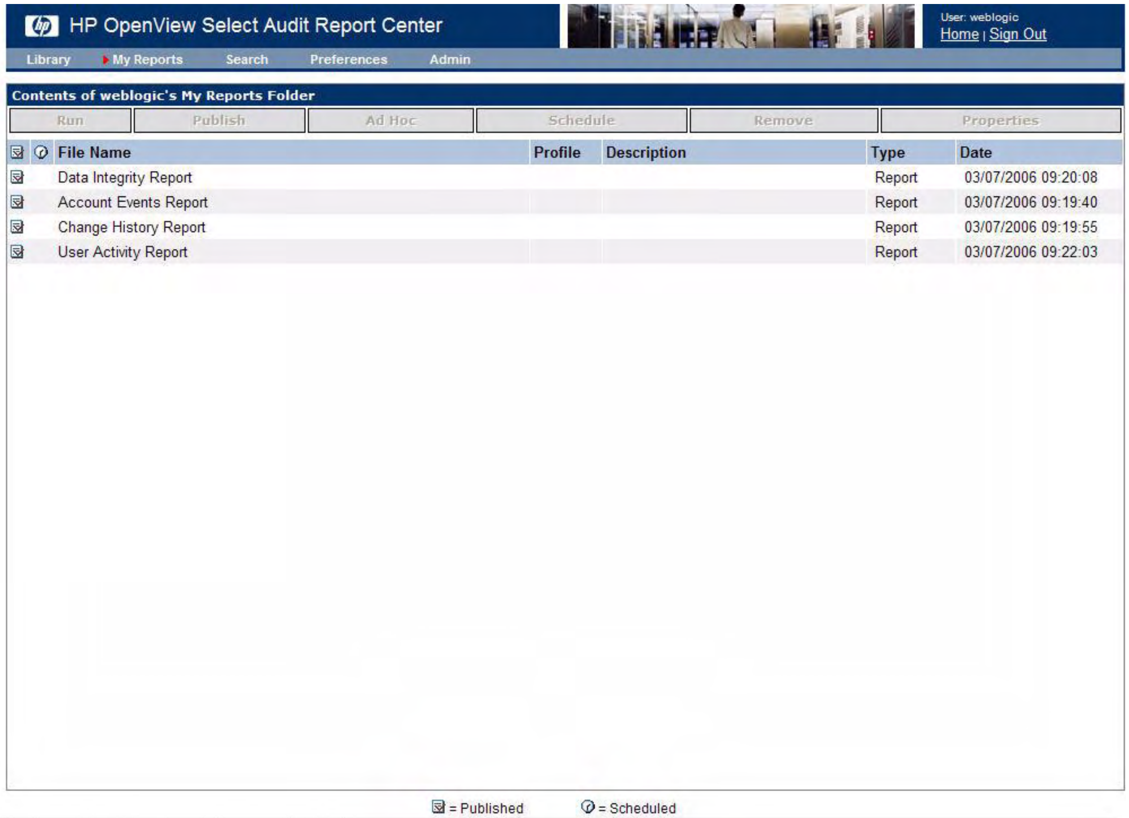


Figure 25 My Reports Folder

The **My Reports** screen displays a single window listing the Library files that you have previously selected using the **Add to My Reports** button.

Using the Library

The Library is divided into two panels, used to manage folders and reports. The left-hand **Folders** panel displays the folders containing reports. The right-hand **Contents of** panel displays the reports contained within the selected folder.

In the Folders panel you can upload new files to the Library. Using the **Contents of** panel, you can run, schedule and remove reports, change report properties and create Ad Hoc reports.

➤ Users and Auditors do not have permissions to modify the folder settings using the **Manage** button.

The Folders panel has four standard folders: **Catalog**, **Models**, **Select Audit Reports** and **User Scopes**.

Catalog

The Catalog folder contains the parameter, query, permission and theme files available through the Select Audit Report Designer.

Models

The Models folder contains reports generated by the loaded models. The structure of the folder is shown in Figure 26.

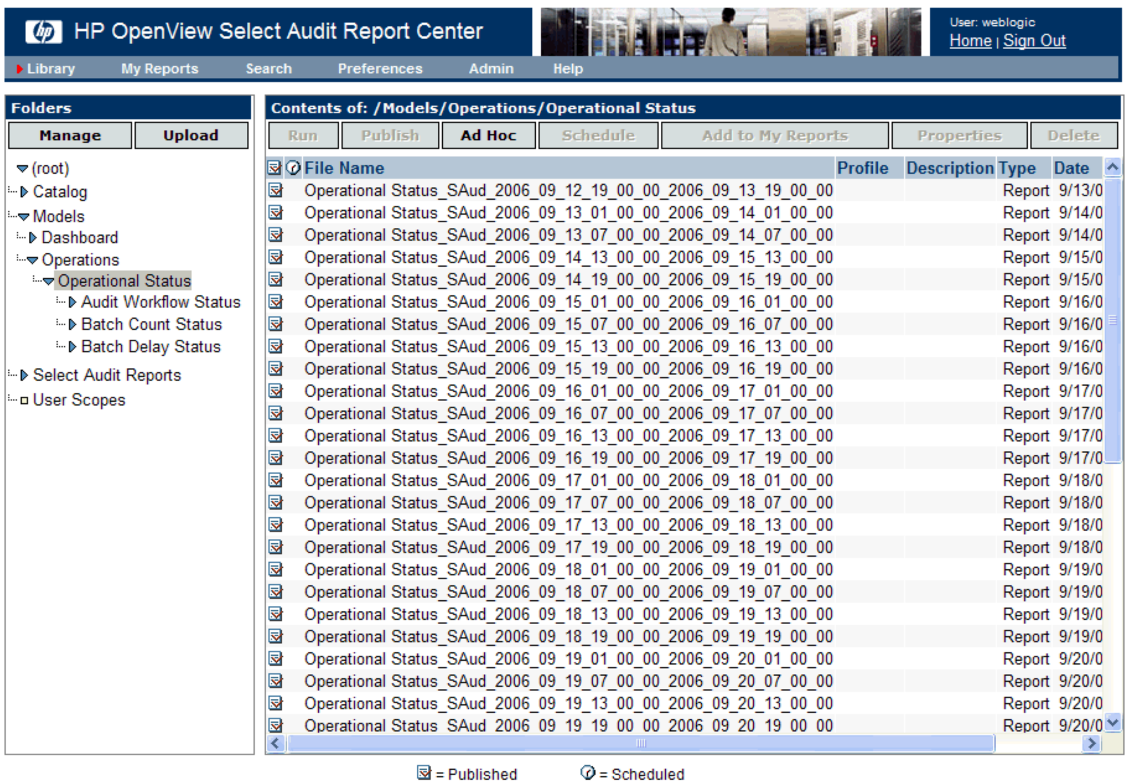


Figure 26 Models Folder

The model reports are categorized into subfolders including one folder for the Operations model and folders for any loaded compliance models. The Operations reports are categorized in the **Operational Status** subfolder. You can drill down through the subfolders to view smaller levels of data.

The Operations reports are run at 1:00 am, 7:00 am, 1:00 pm and 7:00 pm. The compliance model reports are initially created when the model is loaded. They are run every 24 hours at 2:00 am.

Select Audit Reports

The Select Audit Reports folder contains 15 predefined Select Audit Reports, as listed in Table 5:

Table 5 Select Audit Reports

Report Name	Details
Account Change Report	Contains all user account change actions (add, delegate, change, etc.).
Account Events Report	Contains all account event actions (security violations, admin login errors, expired passwords, etc.).
Administrator Report	Contains all administrator actions (configuration changes, authentication changes, password resets, etc.).
Attestation Report	Contains all attestation actions (approved, pending, denied).
Change History Report	Contains administrative audit as complete tasks (the action initiated on this date by this user at this time, approved first by this person at this time, approved next by this person at this time, and the change took affect at this time).
Configuration Report	Contains all configuration change actions (add, change, etc.).
Data Integrity Report	Contains a list of tampered records IDs and tampered signature record IDs, with change actions (added, modified, removed).
Password Management Report	Contains all password administration actions (expire, logon, etc.).
Raw Message Report	Contains raw audit messages that aren't normalized through the standard process.
Security Events Report	Contains all security events (security violation, configuration changes, etc.).
Service Report	Contains configuration changes to Select Identity services.
System Activity Report	Contains all system activities (login, logout, changes made, etc.).
User Activity Report	Contains all user activities (login, logout, changes made, etc.).
User Summary Report	Contains a summary of user activities.
Workflow Events Report	Contains all workflow event messages.

User Scopes

User Scopes is the default home directory for all users in the Library. When you create reports, they are saved to this folder by default.

Uploading Files

1 In the Library, select the folder that you want to upload a file to.

2 Click **Upload**. The **Upload** screen appears.

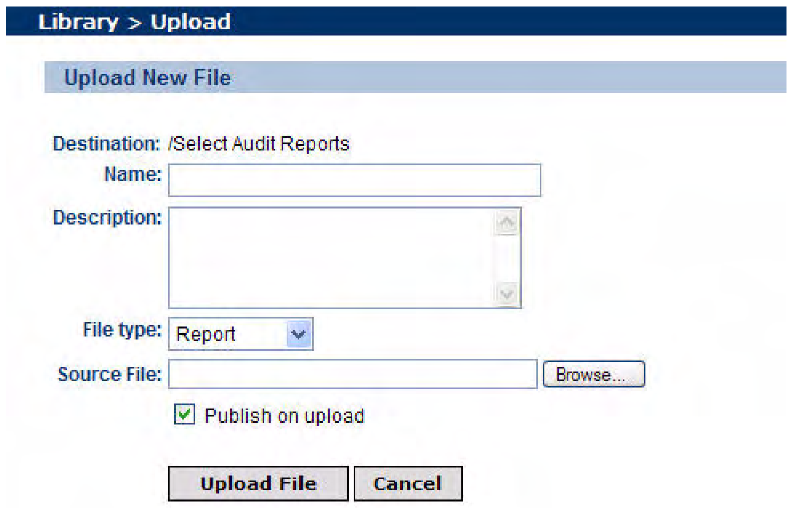


Figure 27 Upload Screen

3 Enter the name of the file in the **Name** field.

4 Optionally, enter a description in the **Description** field.

5 Select a file type from the **File Type** drop-down list.

6 Enter a path or click **Browse** to specify the location of the source file in the **Source File** field.

7 Select **Publish on upload** to publish the report when you upload the file.

8 Click **Upload File**. The report appears in the **Contents of** panel of the Report Center.

Managing Reports

You manage reports in the **Contents of** panel. Select the folder containing the report and select the report in the right-hand panel.

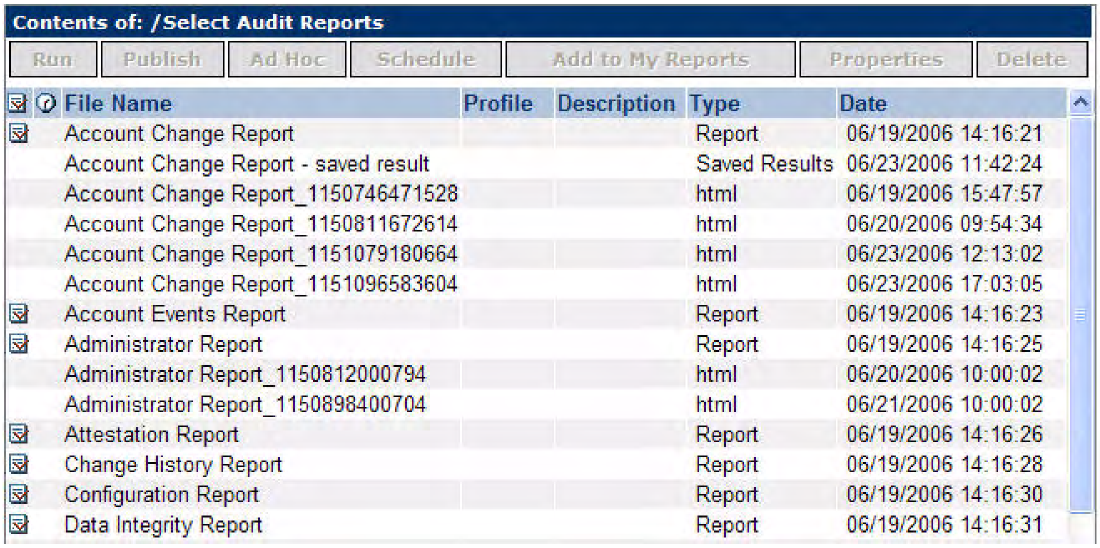


Figure 28 **Contents Of Panel**

The buttons at the top of the **Contents of** panel are described in Table 6:

Table 6 Report Buttons

Button	Description
Run	Generates the report from the file.
Publish	Publishes the report. If the report has already been published, this button is grayed out.
Ad Hoc	Creates a new report using the Ad Hoc wizard.
Schedule	Used to create and manage a schedule for automatically generating reports.
Add To My Reports	Adds the file to a list of frequently-used files.
Properties	Used to view file properties and performance statistics, and modify scheduling and permissions.
Delete	Deletes the report file from the Library.

To run a report

Select a report and click **Run**. A new window opens displaying the report.

> You can also run a report by hovering the mouse over the **Run** button and selecting the output format you want.

To schedule report execution

1 Select a report and click **Schedule**. The **Library > Schedule** screen appears.

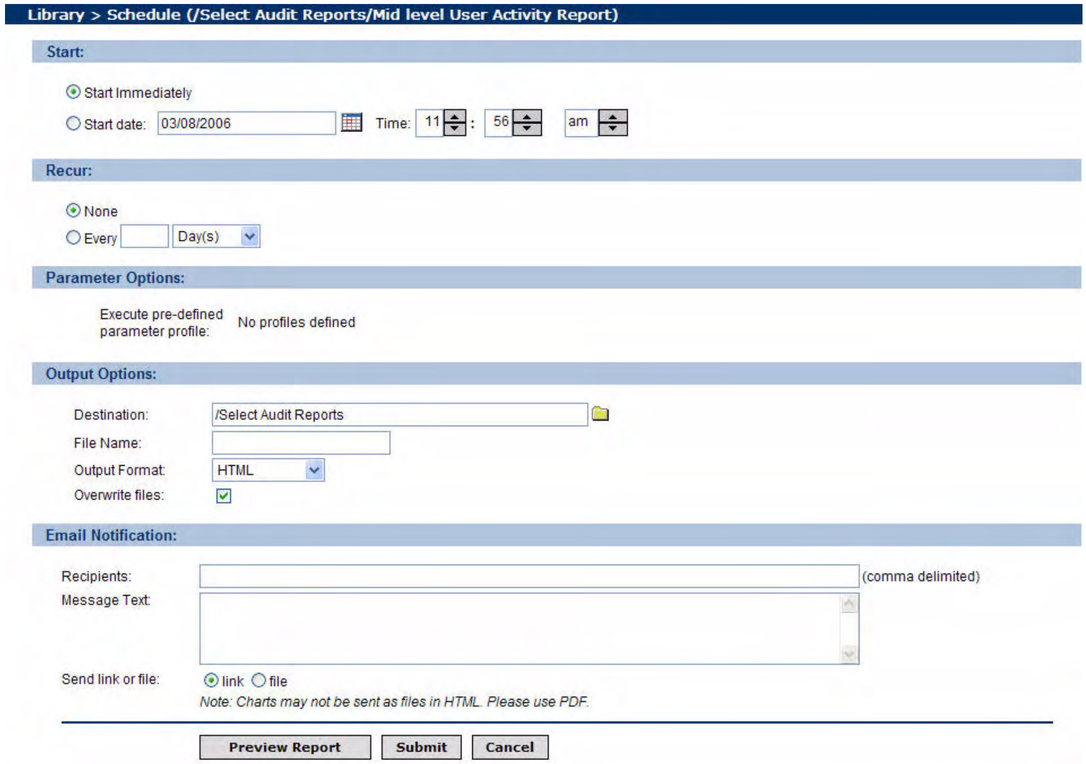


Figure 29 Library > Schedule

You can schedule a report, specify the output destination and format, and send email alerts to specified recipients.

2 Enter information for the following sections:

Start	Schedule a report to start immediately, or specify a date and time.
Recur	Specify the frequency. Possible choices are Minutes, Hours, Weeks, Days, and Months.
End	Specify a date and time or number of occurrences.
Output Options	• Specify a destination folder. • Choose a file name. • Specify output format – HTML, XML, PDF, CSV, or Excel. • Check **Overwrite files** if you want new scheduled output to override the old.
Email Notifications	Enter one or more email addresses to receive email alerts, and specify whether to send the output as a link or as an attached file.

3 Click **Submit**. The icon appears beside the report name in the **Contents of** panel to indicate a schedule is set for the report.

To check report properties

Select a report and click **Properties**. The **Library > Properties** screen appears.

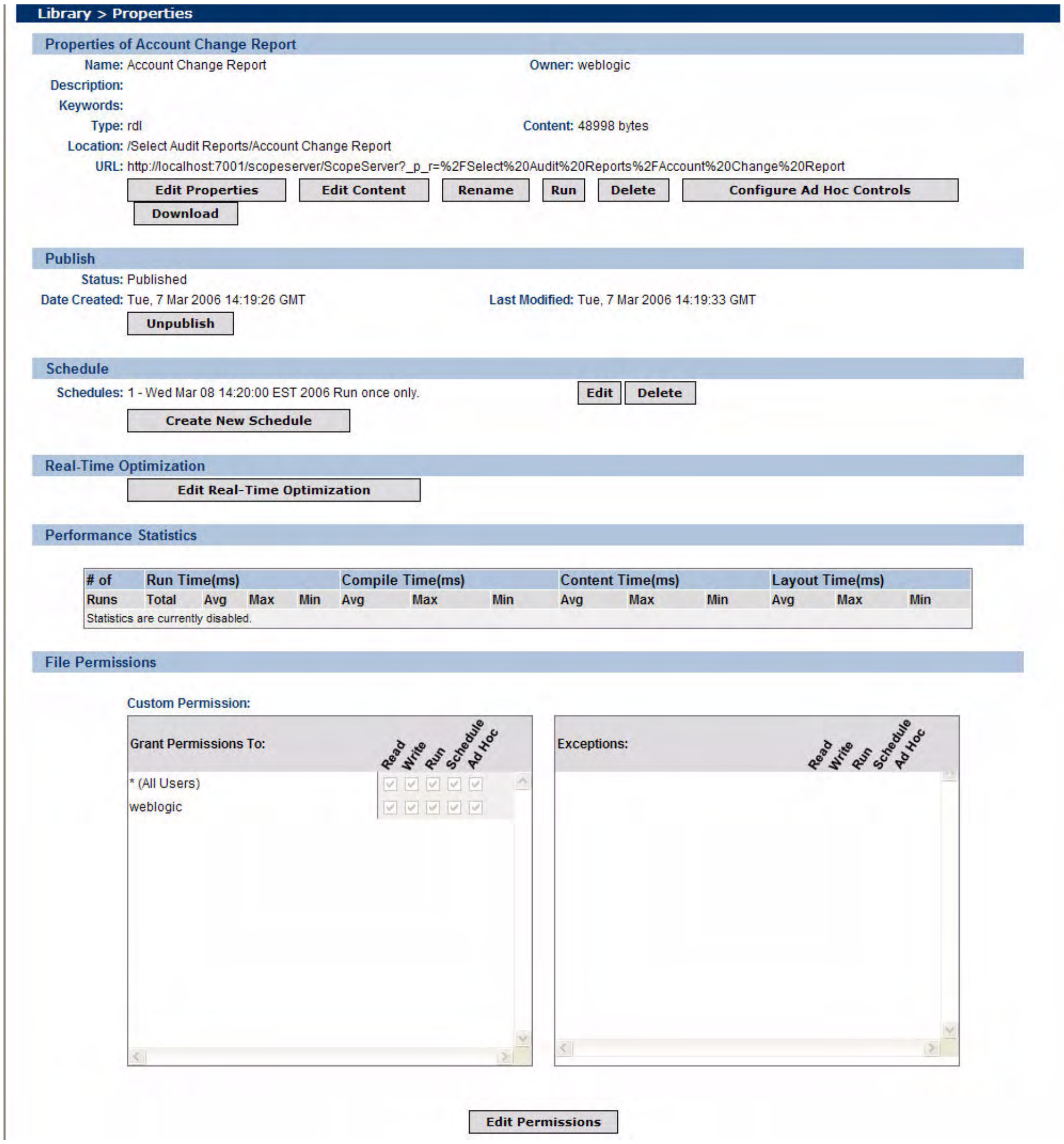


Figure 30 Library > Properties Screen

The **Properties** screen enables you to view report properties and performance statistics, or to reset schedule or permissions. The sections of the screen are described in Table 7.

Table 7 Properties Screen Sections

Section	Description
Properties <*report name*>	Displays the selected report's properties. It contains the following buttons: • Edit Properties provides a report description, or lets you specify search keywords. • Edit Content is used to modify the RDL file. • Run runs the report. • Delete removes the current report from the Library. • Configure Ad Hoc Controls configures the Ad Hoc controls for the current report.
Publish	Indicates the Status and Date Published. To unpublish report, click **Unpublish**.
Schedule	Allows you to create a new schedule for the report.
Real-Time Optimization	Click **Edit Real-Time Optimization** to upload or add a new optimization descriptor.
Performance Statistics	Lists the following statistics: • The number of report runs • The time taken to run • The time taken to compile • The time taken to build content • The time taken to create layout
File Permissions	Displays existing file permissions.

Running the Ad Hoc Wizard

You can create and modify report layouts using the **Ad Hoc** wizard. The Ad Hoc wizard is a browser-based tool that lets you design layouts for your own reports. Any report in the Library with Ad Hoc permission can be used to launch the Ad Hoc wizard.

The Ad Hoc wizard leads you through a series of steps to create the desired layout. You can move back and forth between steps or jump directly to the desired step. At any point in the wizard, you can save the report or preview it in its current state.

The Ad Hoc wizard is used to fashion tabular or graphic layouts using the information that the developer puts in a report. If the report contains parameters, the report developer can use the Report Center to make the Ad Hoc wizard use different labels or parameter mappings for the report.

For more information on configuring the Ad Hoc wizard, see the *HP OpenView Select Audit 1.01 Report Center User's Guide*.

Creating a Tabular Report

1 Select the report in the Library or My Reports view, then click **Ad Hoc**. The **Report Type** screen appears.

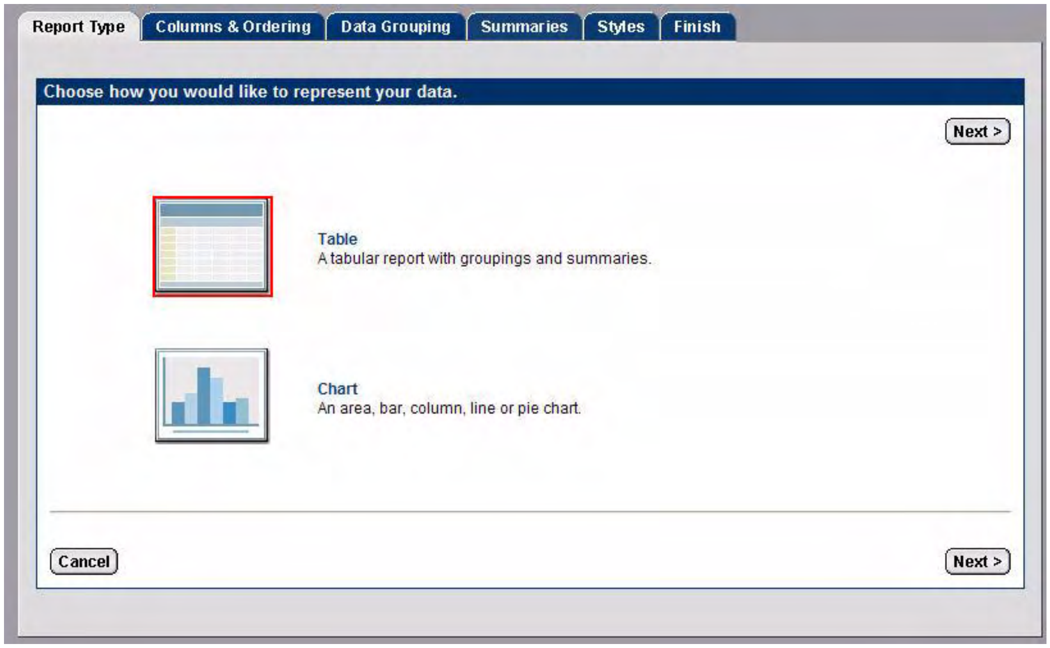


Figure 31 Report Type Screen

2 Select **Table** and click **Next**. The **Columns and Ordering** screen appears.

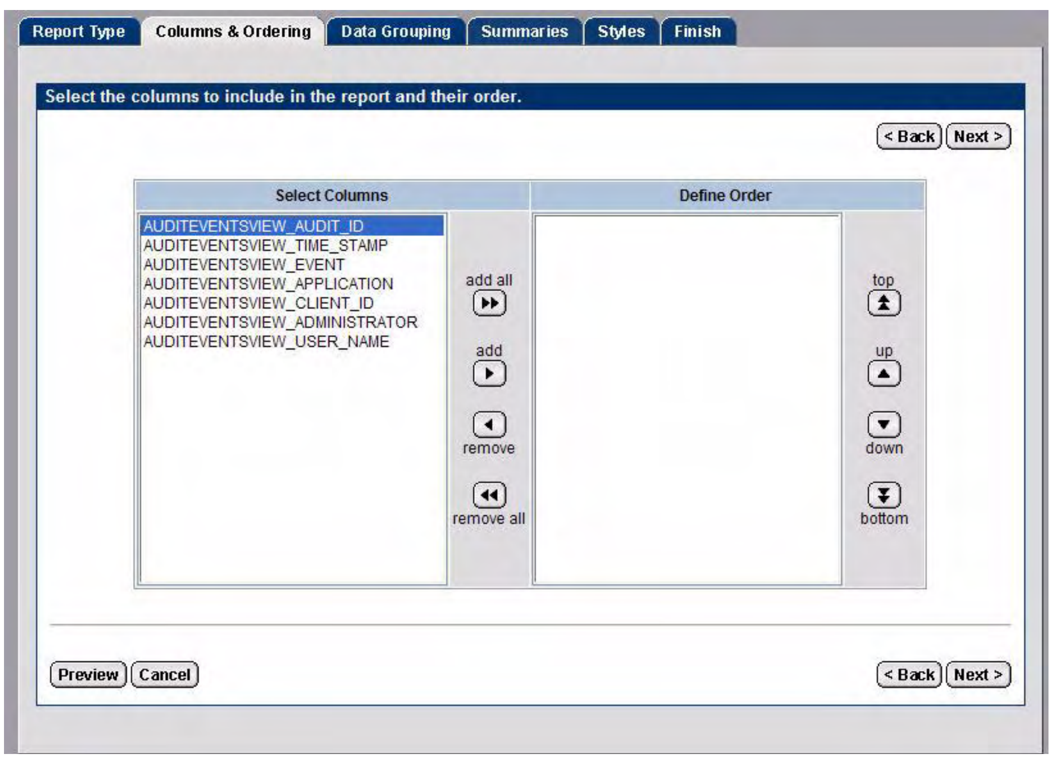


Figure 32 Columns and Ordering Screen

3 Select the columns you want to include in the report and use the **Up** and **Down** arrows to define the order of the columns.

4 Click **Next**. The **Data Grouping** screen appears.

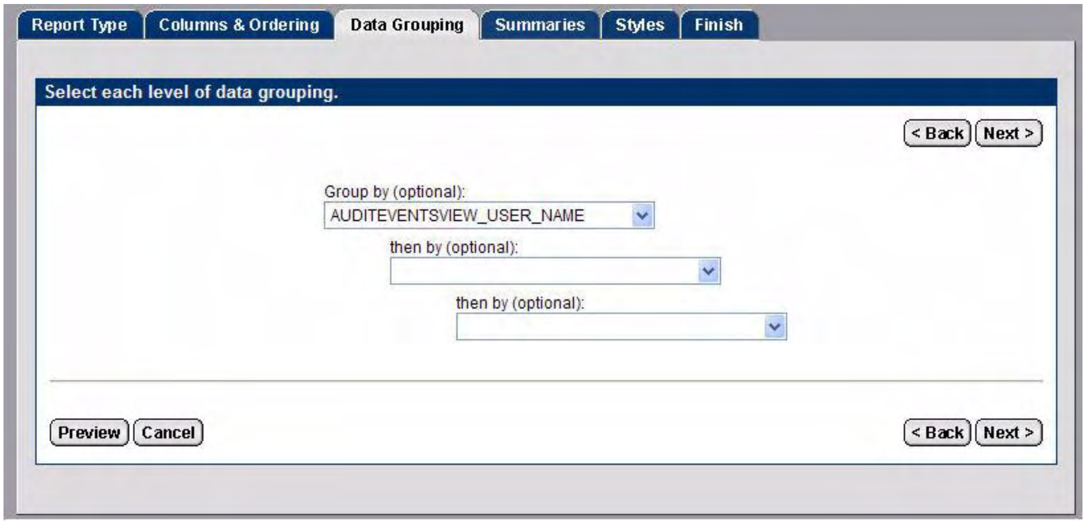


Figure 33 Data Grouping Screen

5 Optionally, select how you would like the report data grouped and click **Next**. The **Summaries** screen appears.

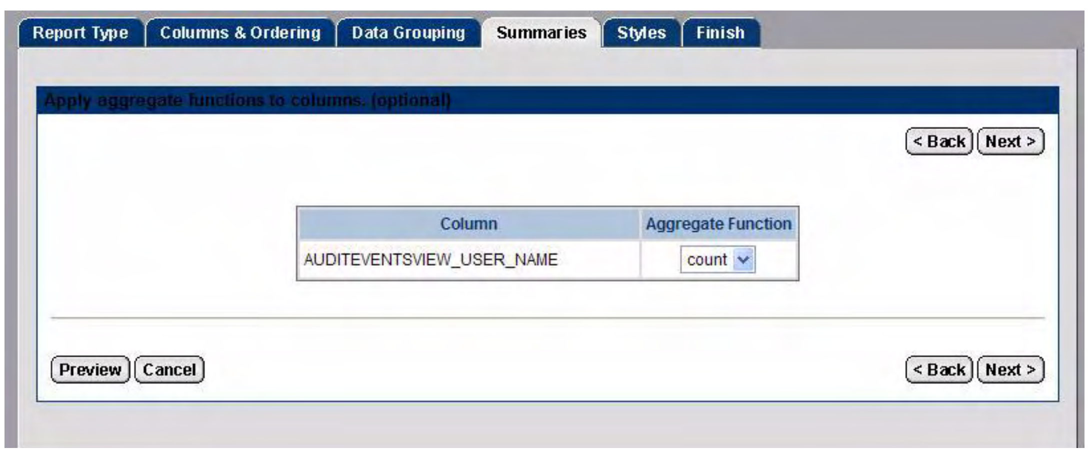


Figure 34 Summaries Screen

6 Optionally, select an aggregate function for the column and click **Next**. The **Styles** screen appears.

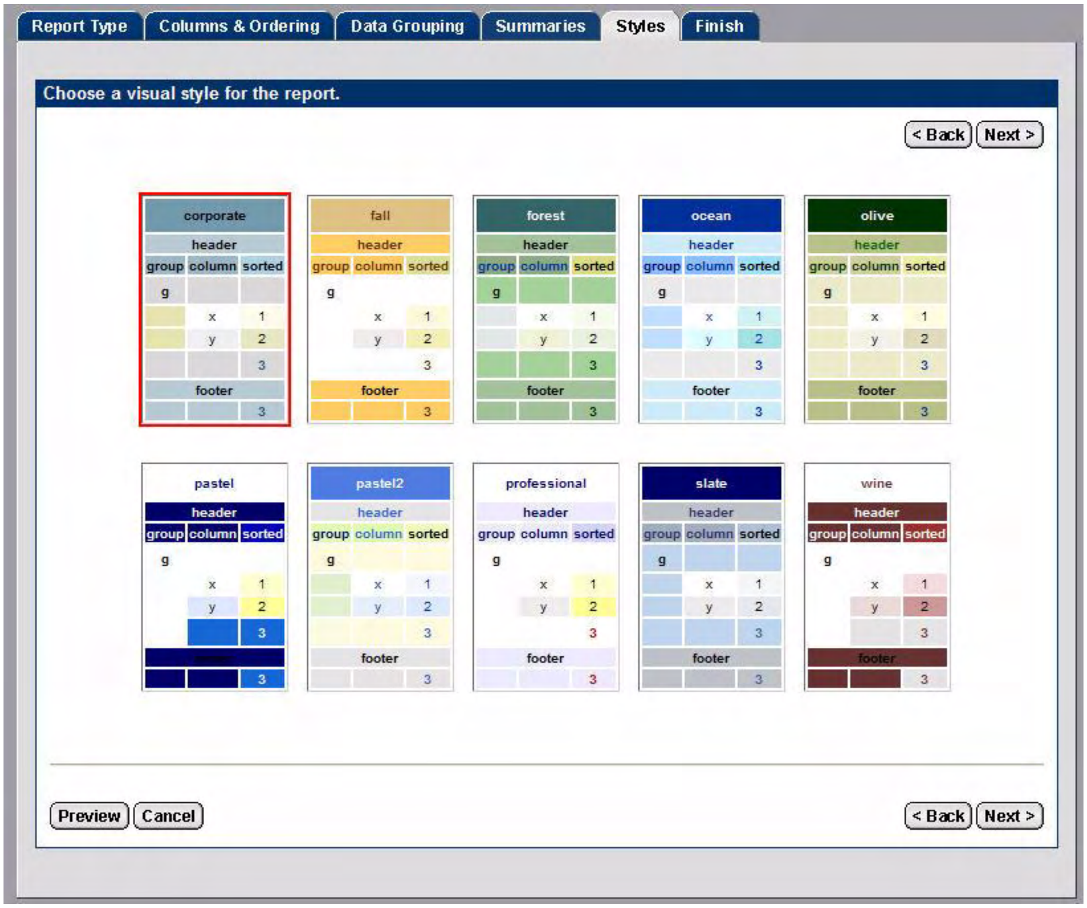


Figure 35 Styles Screen

7 Select a style for the report and click **Next**. The **Finish** screen appears.

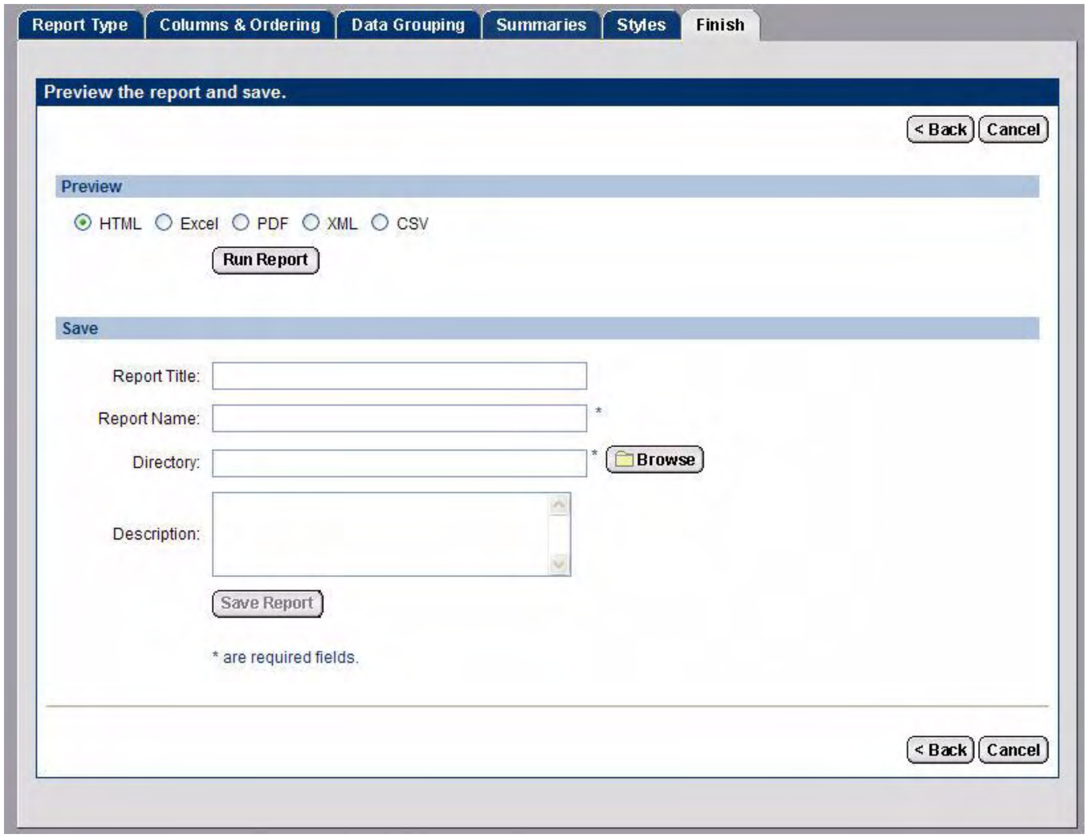


Figure 36 Finish Screen

8 Select a report format and click **Run Report** to preview the report.

9 Enter a **Report Title**, **Report Name**, **Directory**, and **Description** for the report in the corresponding fields.

> Click **Browse** to select the directory where you want to save the report.

10 Click **Save Report**. The Ad Hoc wizard displays a confirmation message when the report has been saved.

11 Click **Close**. The Ad Hoc wizard closes and the new report is listed in the directory you saved it to.

Creating a Chart

1 Select the report in the Library or My Reports view, then click **Ad Hoc**. The **Report Type** screen appears.

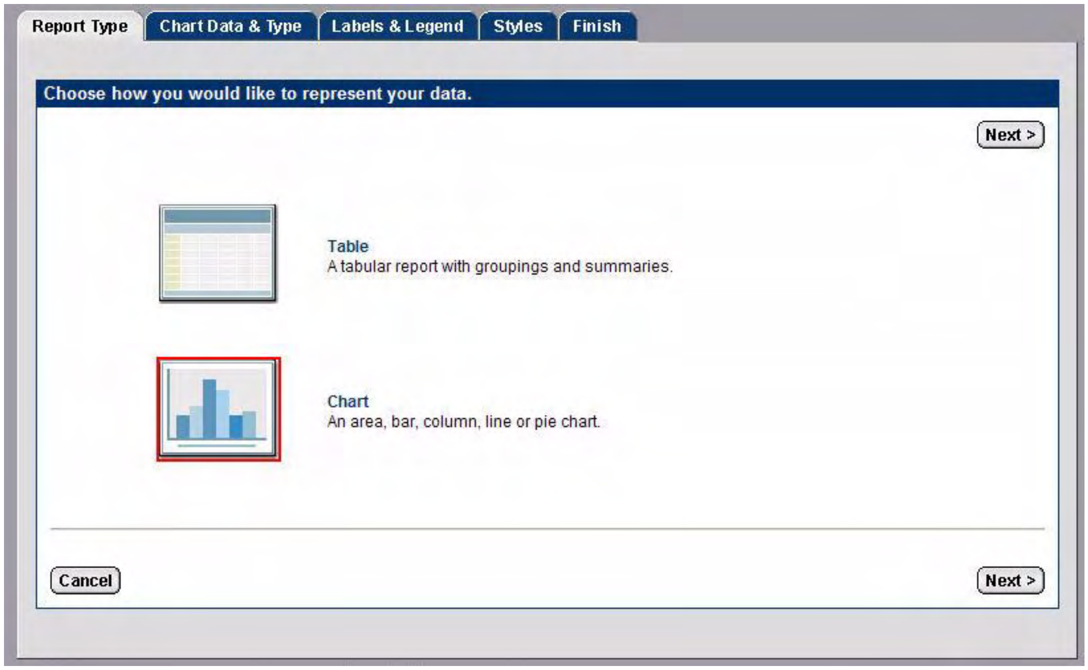


Figure 37 Report Type Screen

2 Select **Chart** and click **Next**. The **Chart Data & Type** screen appears.

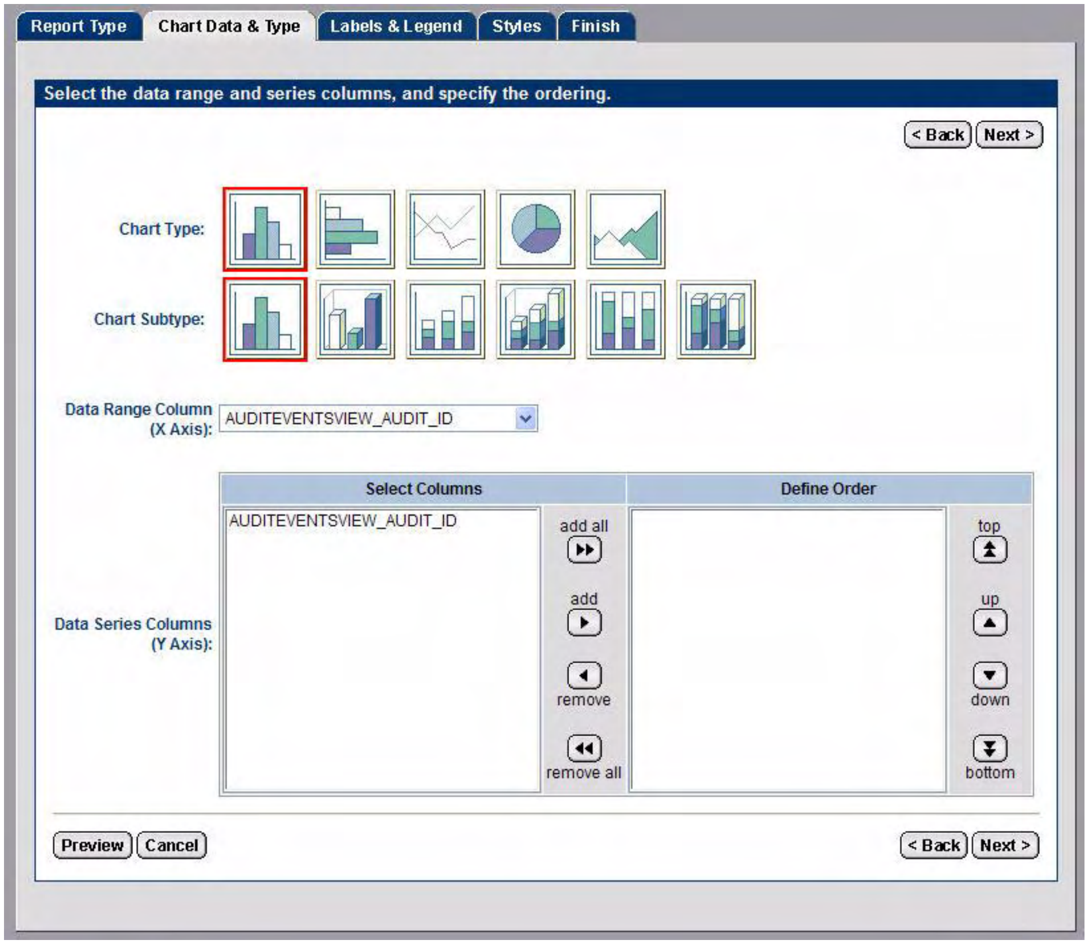


Figure 38 Chart Data & Type Screen

3 Select the following:

- **Chart Type** and **Subtype**
- **Data Range Column**
- **Data Series Columns**

➤ Use the **Up** and **Down** arrows to define the order of the columns.

4 Click **Next**. The **Labels & Legend** screen appears.

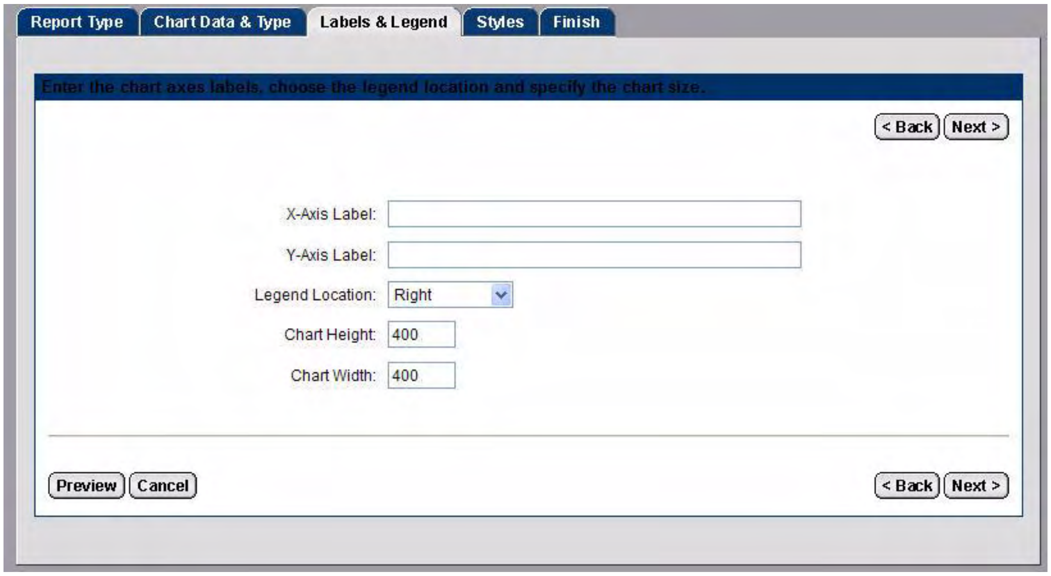


Figure 39 Labels & Legend Screen

5 Do the following:

- Enter an **X Axis Label**.
- Enter a **Y Axis Label**.
- Select a location for the legend from the **Legend Location** drop-down list.
- Enter the **Chart Height**.
- Enter the **Chart Width**.

6 Click **Next**. The **Styles** screen appears.

Figure 40 Styles Screen

7 Select a style for the chart and click **Next**. The **Finish** screen appears.

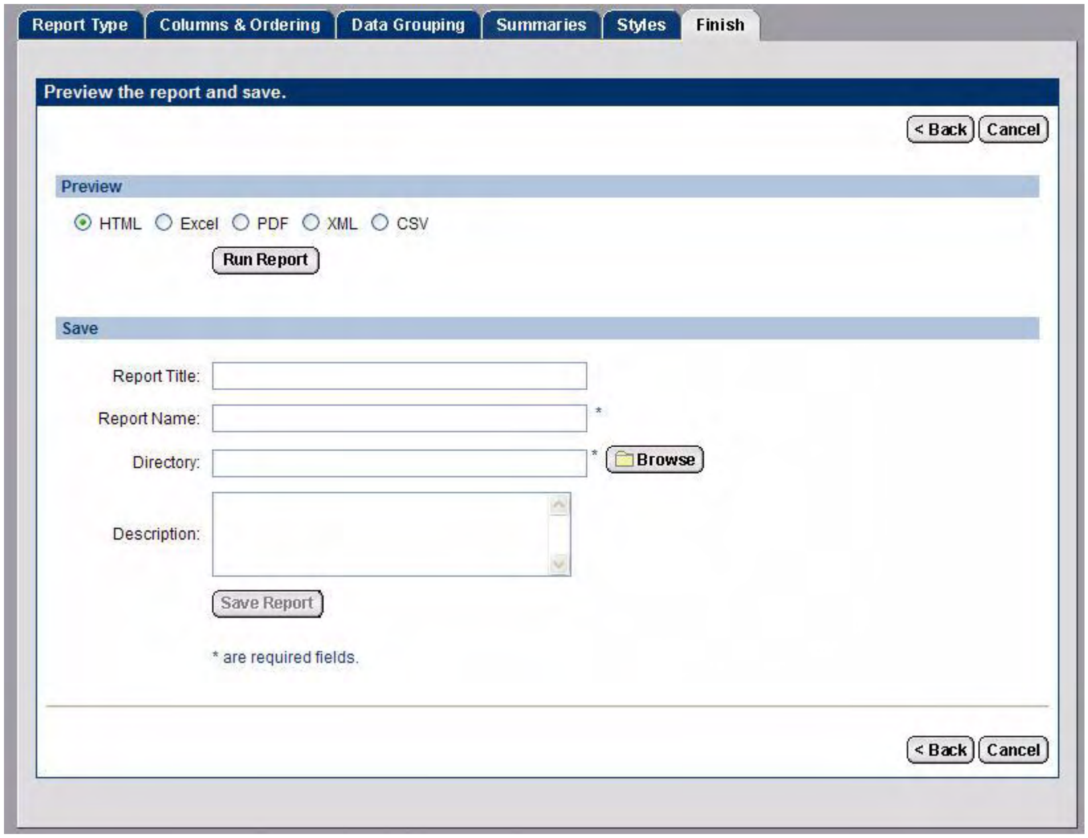


Figure 41 Finish Screen

8 Select a format and click **Run Report** to preview the chart.

9 Enter a **Report Title**, **Report Name**, **Directory**, and **Description** for the chart in the corresponding fields.

> Click **Browse** to select the directory where you want to save the chart.

10 Click **Save Report**. The Ad Hoc wizard displays a confirmation message when the chart has been saved.

11 Click **Close**. The Ad Hoc wizard closes and the new chart is listed in the directory you saved it to.

Searching for Reports

The **Search** screen helps you find a report or other Library file without browsing through the Library hierarchy.

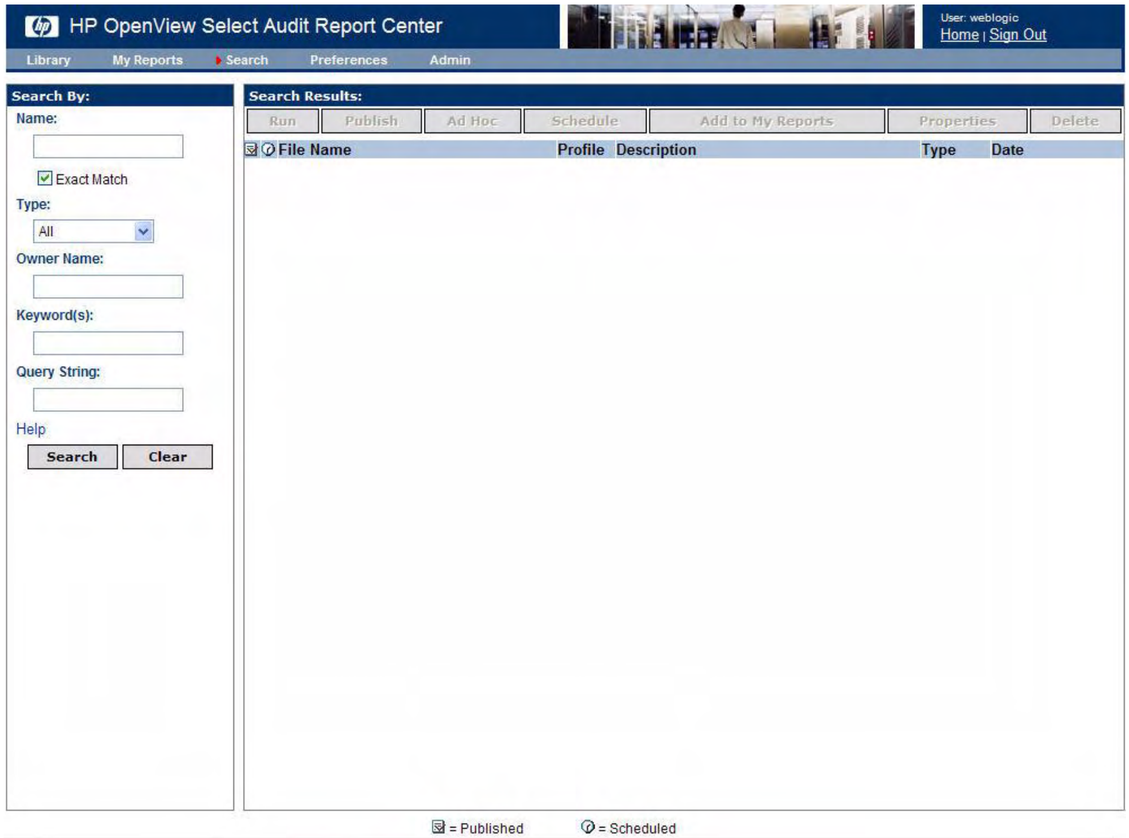


Figure 42 Search Screen

Like the Library screen, the Search screen, has two panels. The **Search By** panel contains the fields that define your search criteria, and the **Search Results** panel displays matching Library files.

If you enter values in multiple fields in the **Search By** pane, all fields must match the file's metadata for the search to succeed. Once you have filled in all the fields, click **Search** to begin the search. To clear the fields, click **Clear**.

To search for a report

1. Click **Search**. The **Search** screen appears.
2. In the **Search By** panel, complete any of the fields as follows:

Name	Enter the name of the report that you are searching for.
Type	Choose whether you are looking for report files (`Report`), already-run scheduled static output (`Output`), interactive views of static data (`Saved Results`), or all files (`all`).
Owner Name	Enter the name of the file's owner.
Keyword(s)	Enter any number of keywords associated with the report that you are looking for.
Query String	Enter a string to filter the returned reports.

3. Click **Search**. Any matching reports appear in the **Search Results** panel.

For more information about searching for reports, refer to the *HP OpenView Select Audit 1.01 Report Center User's Guide*.

To search for data in a report

You can search within a given report for specific data.

1. Click **Reports** → **Library.**
2. Double-click the report you want to search. The report opens in a new browser window.

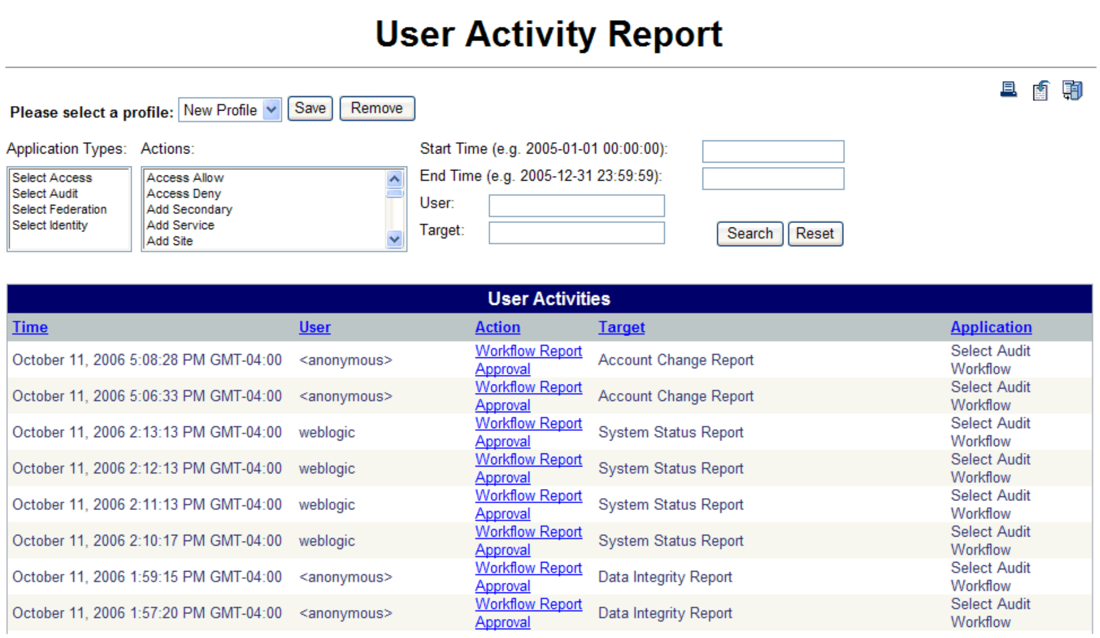


Figure 43 Report Window

3. Enter the search criteria and click **Search**. The results are shown in the **Report** window.

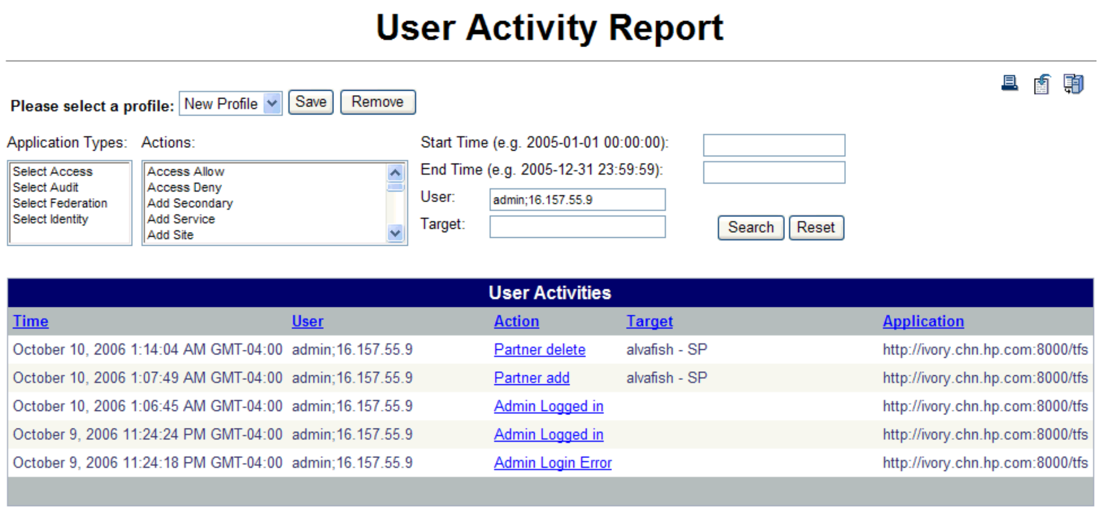


Figure 44 Report Search Results

You can specify an exact value or use wild cards when searching on text field. Two wildcards can be used for searching, "%" and "_". "%" represents 0 to an unlimited number of characters. "_" represents a singe character. The wildcards can be placed anywhere in the search text, and can be used multiple times. For example: `%User%`, `s_User%`, `S%User`, `%User`, `User%`.

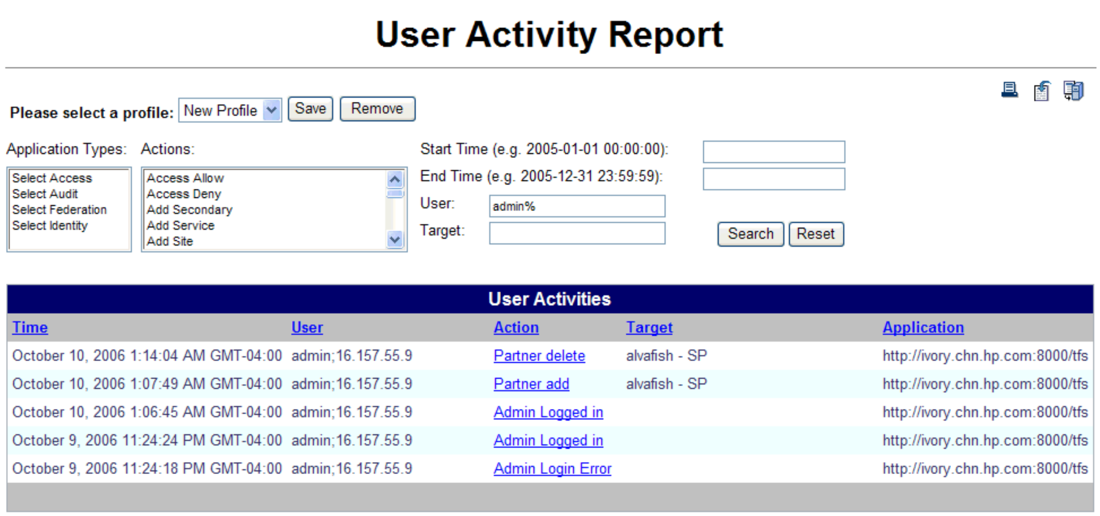


Figure 45 Report Wildcard Search Results

Setting Preferences

You use the **Preferences** screen to set or change your home directory in the Library or your start page (the view that will appear when you launch the Report Center).

➤ Library is the default start page.

1 Click **Preferences**. The **Preferences** screen appears.

Figure 46 Preferences Screen

2 Enter the directory path in the **Home Directory** field.

3 Select a page from the **Start Page** drop-down list and click **Set**.

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