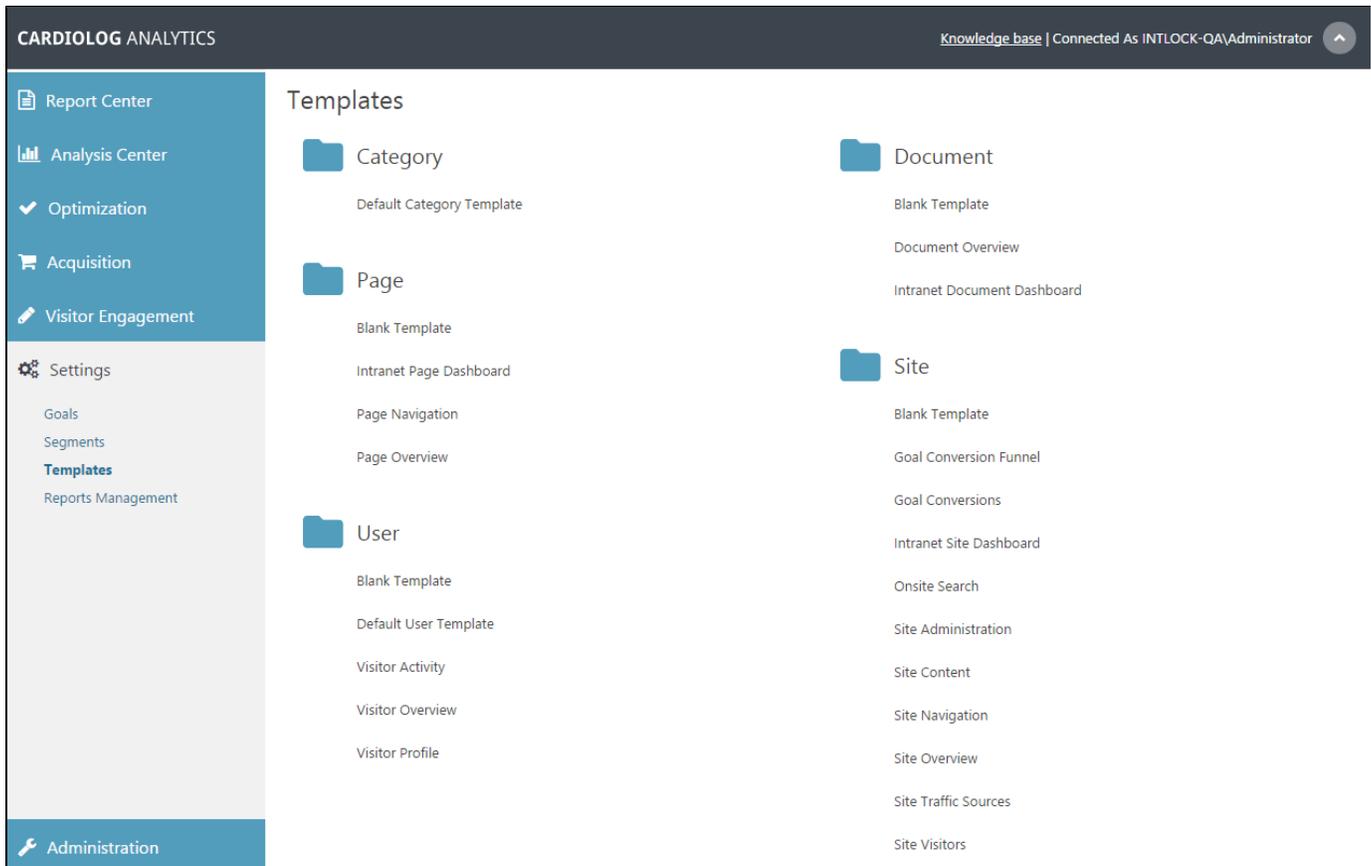


Report Templates

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- Displaying Real Time Data From Within Your SharePoint Portal



Report Templates Main Window.

How to Create a New Template

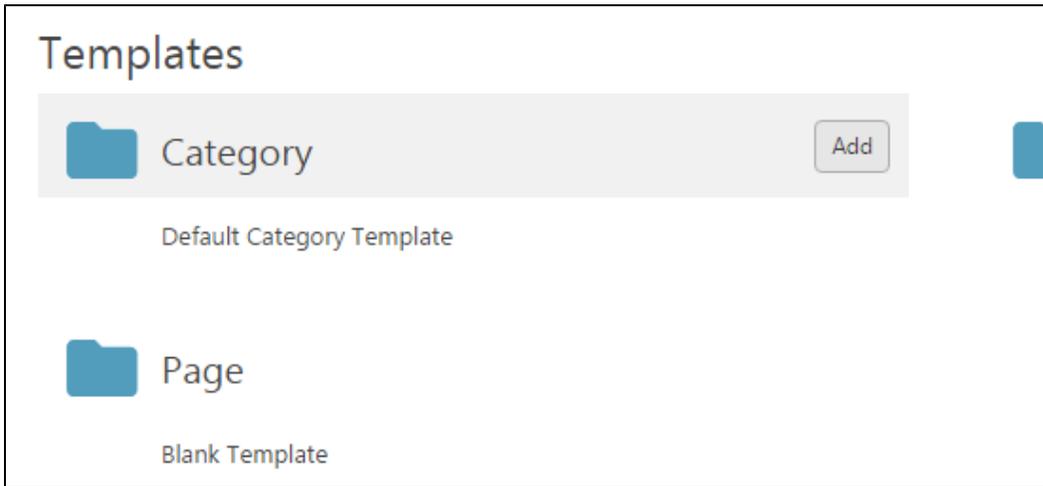
Analysts and Administrators can add templates for a variety of item types within all monitored environments.

CardioLog Analytics report templates are based on system item types. For example, to create a report template for SharePoint sites, select the **Site** item type.

Once a template has been made for a specific item type, that template will only appear under that section.

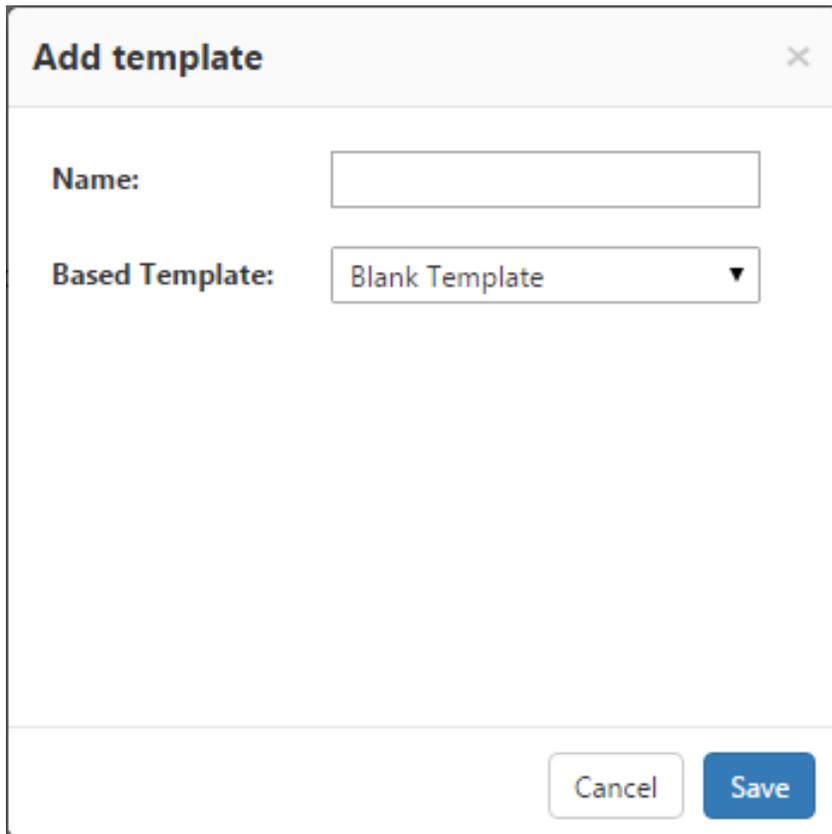
To determine an item type, see the **Entity Type** in [item properties](#).

1. In the Navigation pane, under **Settings**, click **Templates** to view all templates organized by item type.
2. When you hover over an item type, an Add button will appear. Click **Add**.



Add Template Button

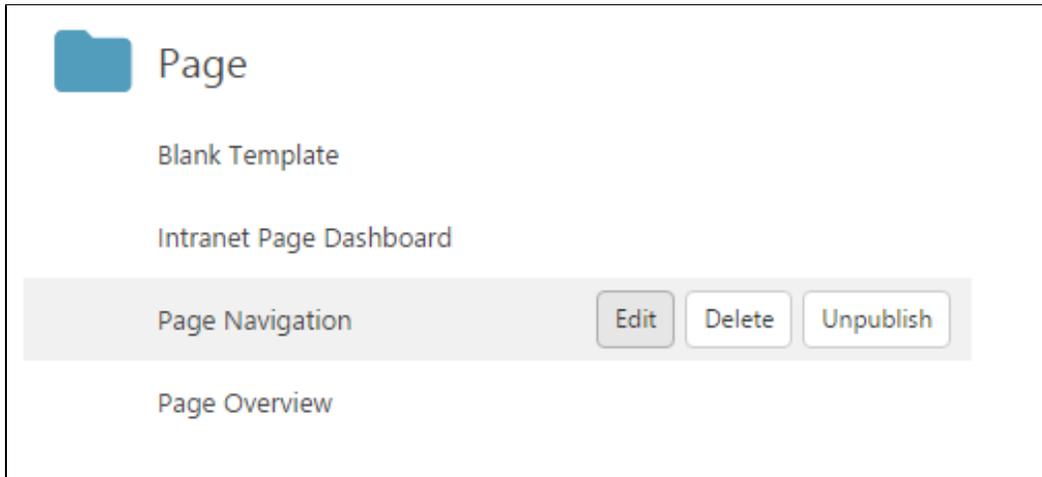
3. In the Add Template dialog, enter the template name in the **Name** text box.
4. If you would like to base your new template on an existing template select one from the **Based Template** drop down list.
5. Click **Save**.
6. Your new template will now be listed under the item type.



Add Template Dialog

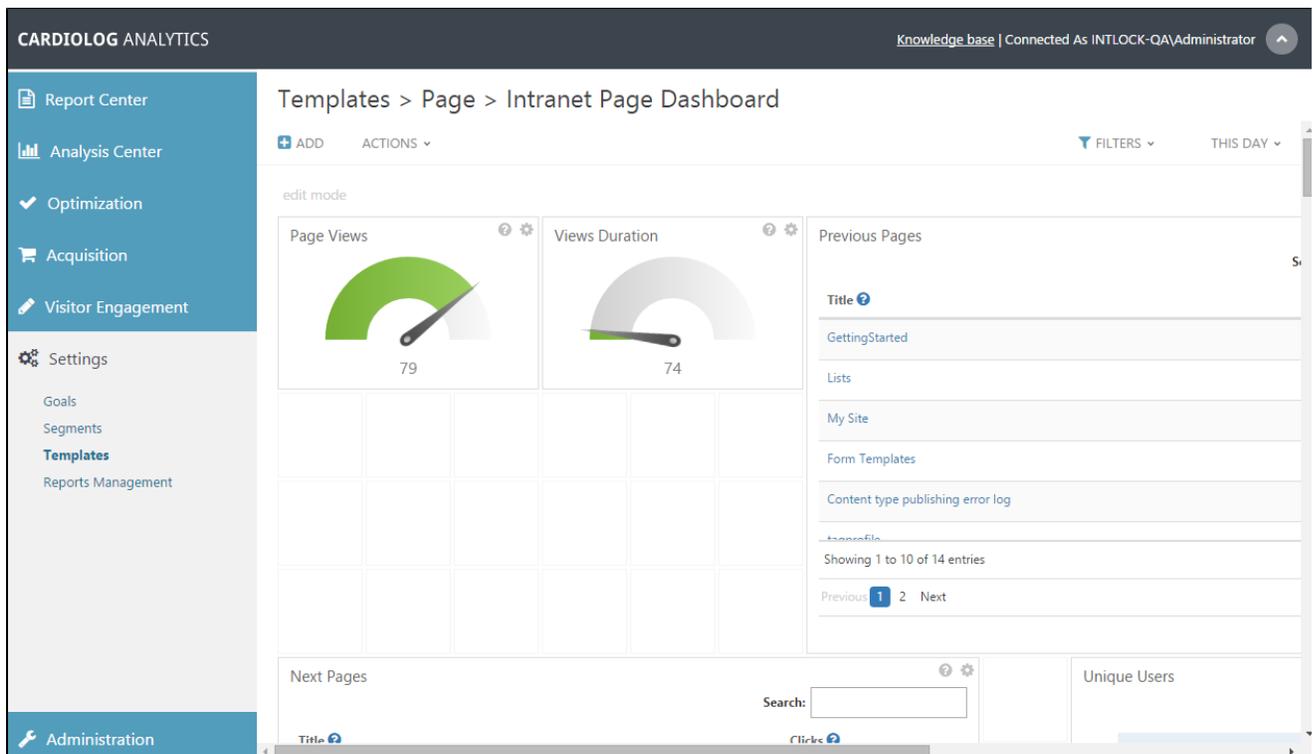
How to Edit a Template

1. To edit a template, hover over it and select **Edit**. When a template is in Edit Mode, you can add widgets to it.



Template Actions

2. Click **Add** in the Top Toolbar, or click any blank space in the template where a plus sign (+) appears, and select a widget to add to the template (A complete list of report widgets can be found in the [Reports Gallery](#)).
3. To delete a template, hover over its title in the Templates main window and select **Delete**.
4. To publish your template for report drill down and for display in the SharePoint "Site Actions" menu, click your template and select **Publish**. For more information about data drill down, see [Data Drilldown](#).
5. If you would like to save your template but make it unavailable for use, select **Unpublish**.



Template in Edit Mode

Displaying Real Time Data From Within Your SharePoint Portal

The ability to export a [CardioLog Analytics report into a SharePoint Web Part](#) is available in order to display specific usage reports within designated SharePoint pages. For example, a localized wiki site manager might want to display a list of the most popular wiki pages on the site's homepage.

You can use the "CardioLog Usage Reports" SharePoint Feature with ad-hoc reporting, which enables the submission of usage queries directly from your SharePoint portal.

1. After installing the "CardioLog Usage Reports" SharePoint Feature, each SharePoint page displays a link to CardioLog Analytics usage

reports, accessible from the Site Actions menu.

2. Select a desired report template in order to run a real time usage report for the page you are visiting. The report is displayed in a new browser window. The default report is based on the "Site Overview" template and displays real-time data for today. For more information see: [View CardioLog Analytics Reports from SharePoint's "Site Actions" Menu](#)
3. The system administrator can create published report templates for pages (objects) in the portal. These templates will be available from the portal pages.

Note: Contact your system administrator in order to install the "CardioLog Usage Reports" SharePoint feature. For more information see [How to install the CardioLog Usage Reports SharePoint Feature](#).