



Converting Legacy Scheduled Reports for SiteAudit 4.0

April 2010

In This Article:

- Conversion Overview
- Creating the View
- Windows Task Scheduler Command

In SiteAudit 3.x, scheduled reports were XML documents. However, a parameter in the Windows Task Manager command was used to specify a stylesheet that could transform the report into HTML, CSV, TXT or other types of documents. If a manager wanted to see the data in the report aggregated or formatted differently, it required a new stylesheet or the modification of one of the supplied samples.

In SiteAudit 4.0, all reports are created from a view; therefore, users have a minimum of fourteen different types of reports that can be scheduled. The six scheduled reports that were available in SiteAudit 3.x can be derived from one of the views in SiteAudit 4.0. There are many ways to organize and filter data in a view and it is also possible to include many styling features to create numerous types of reports. Another new feature in SiteAudit 4.0 is the ability to generate scheduled reports in PDF, RTF, and XLS formats.

Creating and modifying scheduled reports in SiteAudit 4.0 is easy and does not require stylesheets. However, the use of stylesheets is still supported and the rest of this document explains how to reuse your stylesheets and filter documents to recreate the same reports that were created with earlier versions of SiteAudit.

Conversion Overview

SiteAudit 4.0 allows you to reuse the custom stylesheets and filter documents you had created for your SiteAudit 3.x scheduled reports to reproduce the same scheduled reports. However, in many cases, it is better to start from scratch by creating a scheduled report from a SiteAudit view as described in the knowledgebase article, [*Scheduling Reports*](#).

The following is an overview of the steps required to recreate a legacy scheduled report. The remainder of this document describes each of these steps.

- Open a scheduled report template
- Modify the XML file format options
- Configure the scheduled report delivery options
- Save the view
- Configure the Windows Task Scheduler

Open a Scheduled Report Template

Since all reports are created from an existing SiteAudit view, the first thing one must do to support a legacy scheduled report is to recreate a view that contains the information that had existed in the legacy report. This requires that the view display all of the columns of data that exist in the scheduled report. Users may need to add or remove columns to a view so that all the appropriate data appears in the scheduled report. Since users may not know which columns to display in a view, sample view file templates have been created for all legacy scheduled reports. The templates can be found in the SiteAudit installation directory, *Netaphor/SiteAudit/Samples/en/ScheduledReportTemplates*.

Suppose you want to recreate the AssessmentDetails scheduled report. Start by opening the AssessmentDetails.view file via the SiteAudit Viewer **File > Open** menu. Navigate to the SiteAudit installation folder and choose the AssessmentDetails.view from the *Netaphor/SiteAudit/Samples/en/ScheduledReportTemplates* folder. Taking this action opens the view necessary to generate the scheduled report.

Scheduled Report Templates

The following templates are installed with SiteAudit 4.0 to facilitate the creation of legacy scheduled reports. Legacy scheduled reports are those reports that were created in SiteAudit 3.x using custom stylesheets or filter documents. Table 1 indicates which templates are associated with legacy scheduled reports.

Table 1 – Scheduled Report Template Map

SiteAudit 3.x Scheduled Report	Template Name
Assessment Details	AssessmentDetails.view
Inventory	Inventory.view
Low Consumables	LowConsumables.view
Low Consumables by Type	LowConsumablesByType.view
SLA Analysis	SLAAnalysis.view
Usage and Counts	Usage_SampleCSV.view

Quick Guide to Using a Scheduled Report Template

Suppose you had created a stylesheet to display the usage and count data, and instead of using the new scheduled report features of SiteAudit 4.0, you prefer to continue using the stylesheet. The following steps explain what you must do to schedule a similar report using SiteAudit 4.0.

- Select the **File > Open** menu item and open the *UsageAndCounts_XML.view* template from the installation folder, which is typically *C:\ProgramFiles\Netaphor\SiteAudit\Samples\en\ScheduledReportTemplates*.
- Confirm or modify the XML format options
- Configure the email and archival delivery options
- Save the view
- Update the Windows Task Scheduler command

When the Task Scheduler command is executed, the report will be emailed and archived as specified.

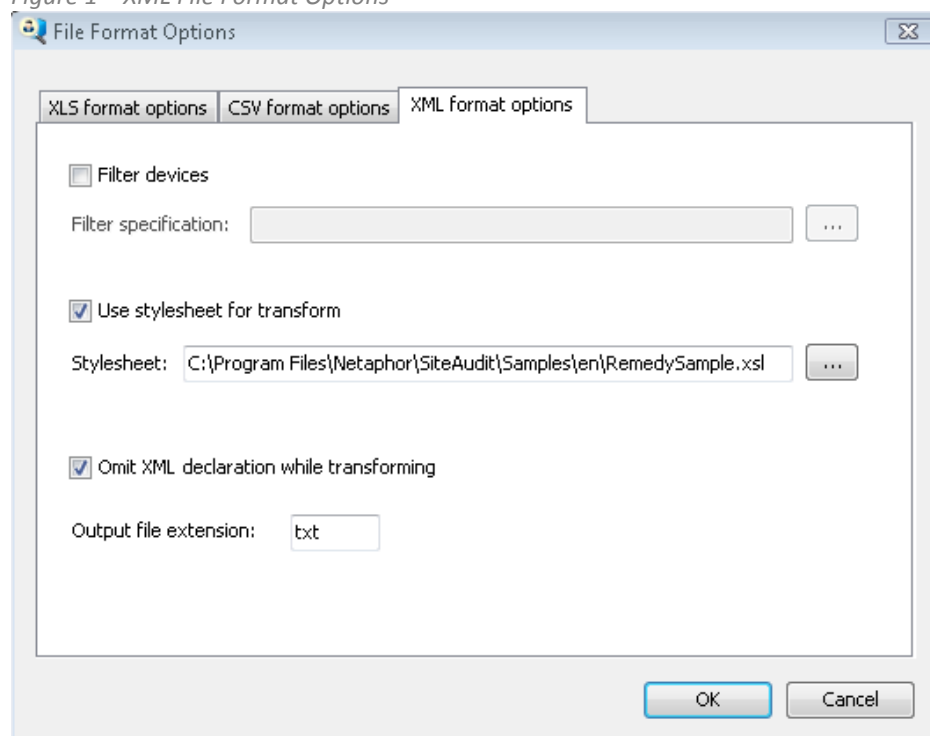
Modify the XML File Format Options

Users must reference their stylesheet and filter document using the *File Format Options* dialog, which can be opened by selecting the **Reports > File Format Options** menu item and selecting the **XML format options** tab as shown in Figure 1.

XML Format Options

SiteAudit 4.0 supports reports in the XML format and allows for specifying an XSL stylesheet to transform and style the report. This allows users to create specialized reports and supplies backward compatibility for scheduled reports produced with SiteAudit 3.x. The XML format options include the option to specify a filter document which filters data from the report prior to applying the stylesheet. Again, this is for backward compatibility as filtered documents are no longer needed in SiteAudit 4.0. Users can filter data in the view using the standard filter control that has always been a part of SiteAudit.

Figure 1 – XML File Format Options



Filter Devices

For users who want to create reports using a filter document that describes what to include in the report, check the Filter devices checkbox and enter the filter document name and path in the *Filter specification*. For more information on filtering report content, refer to the SiteAudit KB article, [Customizing the ReportFilters Document](#).

Use Stylesheet for Transformation

The *XML format options* provide a way for users to specify an XSL stylesheet to transform the XML report content into a preferred style. This option is used to create reports that are not possible using an existing view. For instance, some users may want to transform data into a format that can be input into another program or database and may require special formatting. In this case, a custom stylesheet would be appropriate. To use an XSL stylesheet to transform the XML report, select the *Use stylesheet for transformation* checkbox and enter the name and path of the stylesheet in the *Stylesheet* textbox.

Omit XML Declaration

The *Omit XML declaration while transforming* option removes the XML declaration from the XML report and supports backward compatibility for scheduled reports created with SiteAudit versions prior to 4.0. This option is useful when the declaration is not needed in the XML report.

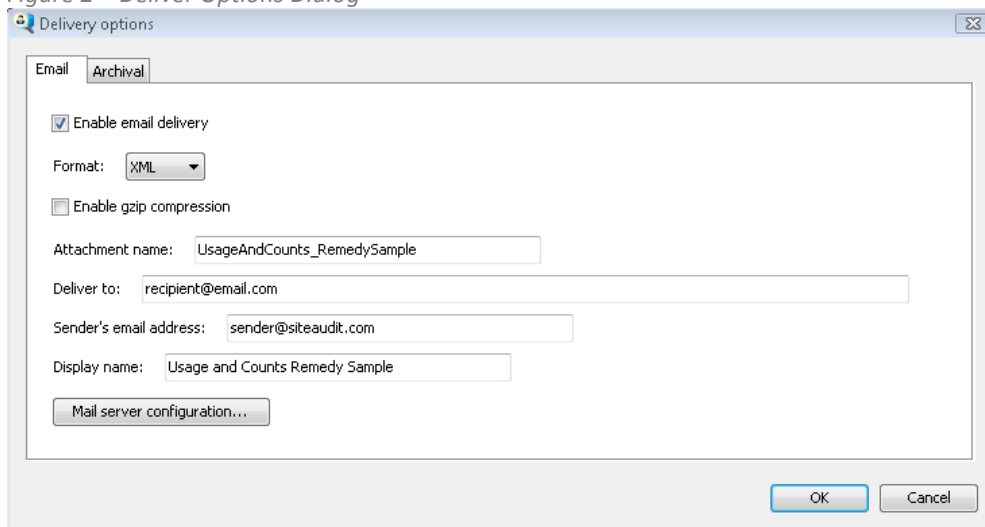
Output file extension

The Output file extension is the extension that will be applied to the report when it is created. By default the report extension is XML; however, if your stylesheet transforms the report into another format such as CSV, TXT, HTML, et cetera, then enter the desired extension in the *Output file extension* textbox.

Configure the Scheduled Report Delivery Options

It is necessary to configure the email and archival delivery options for your scheduled report. Open the *Delivery Options* dialog by selecting the **Reports > Delivery Options** menu item.

Figure 2 – Deliver Options Dialog



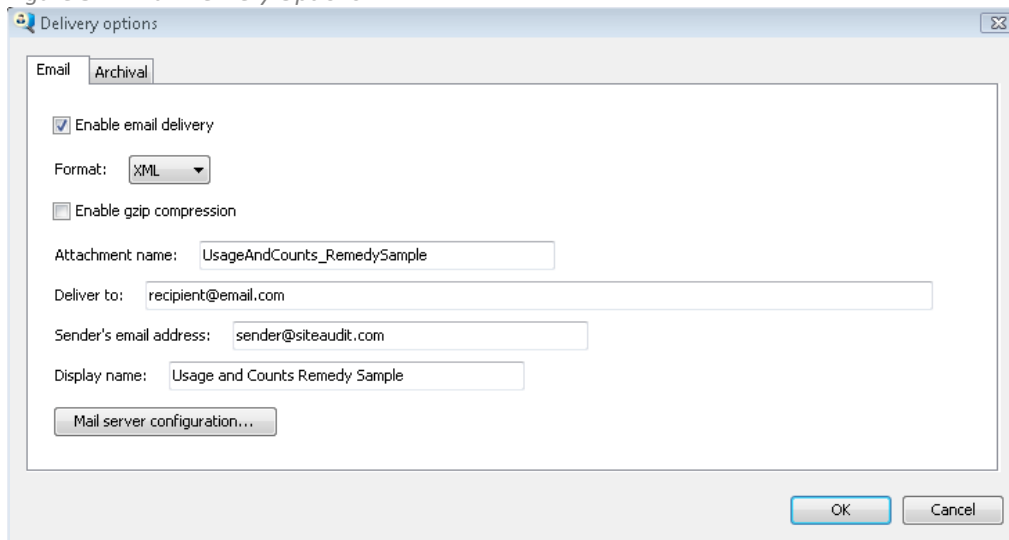
The *Delivery Options* dialog contains a tab for configuring email options and one for configuring the desired archival options. The following sections explain how to configure these options.

Scheduling Email Delivery Options

SiteAudit reports can be emailed to specified recipients whenever that Windows Task Scheduler task is executed. Reports are included as attachments to an email. This section describes how to configure the email options.

To enable email delivery of a report, check the *Enable email delivery* checkbox and configure the rest of the email options. If the report should not be emailed, then uncheck this checkbox.

Figure 3 – Email Delivery Options



Format

Reports can be emailed in one of the following formats: PDF, XML, HTML, RTF, XLS, or CSV. If an XSL stylesheet or filter document is specified in the *File Format Options* dialog, then this option MUST be set to **XML**. Otherwise, it is safe to choose the desired format option. In SiteAudit 3.x, all reports were XML documents and required stylesheets to stylize or convert the report to a desired format. This is no longer necessary as SiteAudit 4.0 scheduled reports can be delivered in any of the supported formats.

Enable File Compression

Check the *Enable gzip* compression checkbox to compress the report. When this option is selected, a report is compressed when it is attached to an email. The report file extension will be gz and users must uncompress the file to view the report. Compressing a report is useful when the size of the report is very large. The size of a report can be an issue since some routers do not allow email attachments larger than 5MB.

Attachment Name

All scheduled reports are delivered as email attachments. Enter a name for the report attachment in the *Attachment name* textbox. For example, suppose the attachment name is ABC and the desired report format selected was PDF. The email attachment and/or archived file name will be ABC.pdf. If gzip compression is enabled, the report file name would be ABC.gz.

Deliver To

Enter the email recipients in the *Deliver to* textbox. Each email recipient addresses must be separated by a comma or semi-colon.

Sender's Email Address

Enter the address of the email sender. This address will appear in the FROM portion of the delivered email and can be any valid email address. This field must contain a valid email address in order for SiteAudit to email a scheduled report.

Display Name

Enter the sender's display name in the *Display name* textbox. For example, suppose a user enters the sender's email address as *abc.com* and enters the display name, *siteaudit*. The email will appear to have come from *siteaudit [abc.com]*.

Mail Server Configuration

In order to send email, the mail server must be configured. Click the **Mail server configuration** button to open the *Mail Server Configuration* dialog. Enter the server information and credentials if required. To confirm that the mail server is configured properly, enter data into the *Test email configuration* section and click the **Send test message** button. Confirm that the test email was delivered.

Figure 4 – Mail Server Configuration Dialog

Mail Server Configuration

Configure the mail server settings. The outgoing mail server (SMTP) must be specified, along with the appropriate authentication credentials, if your mail server requires authentication. The configuration can be tested by sending a test message to the specified recipient.

Outgoing mail server (SMTP): Port:

Use encryption (SSL)
 Use authentication

Authentication credentials

User name:
Password:

Test mail configuration

Test message:

Deliver to:

Sender's email address:

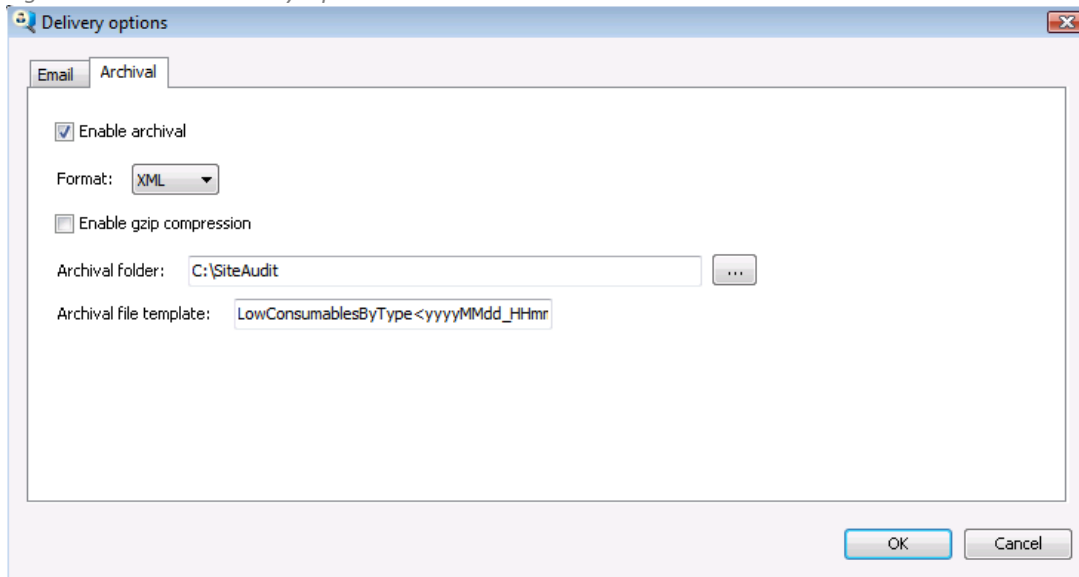
Display name:

Scheduling Archive Delivery Options

SiteAudit reports can be archived to a storage location periodically using the Windows Task Scheduler. When the Task Scheduler task is invoked, SiteAudit generates and archives the report as defined in the *Mail Server Configuration* dialog.

To allow reports to be archived, check the *Enable archival* checkbox. If this checkbox is not selected, reports will not be archived.

Figure 5 – Archival Delivery Options



Format

Reports can be archived in one of the following formats: PDF, XML, HTML, RTF, XLS, or CSV. Select the desired file format for the report. For scheduled reports that use stylesheets to transform the report, this field **MUST** be set to **XML**.

Enable File Compression

Check the *Enable gzip* compression checkbox to compress the report. When this option is selected, a report is compressed when it is archived. The report file extension will be gzip and users must uncompress the file to view the report. Compressing a report is useful when the size of the report is very large.

Archival Folder

Enter or select the folder where you want schedule reports to be archived

Archival Template

The archival template allows users to define the file name of their report and include a date/time stamp. Each time a report is generated the file name will be appended with the current date and time. Suppose a Windows Task Scheduler task has been created to archive a consumable report once a month.

Example

Suppose a user entered an archival template name as: Consumables<yyyyMMdd> and the report was generated on January 1, 2010; February 1, 2010; March 1, 2010. The archived reports will be named,

- Consumables20100101.html
- Consumables20100201.html
- Consumables20100301.html

The file extension is determined by the file type that was specified in the *Delivery Options* dialog.

Save the view

A view must be saved before it can be scheduled for email or archival delivery. Save a view by selecting the **File > Save** or **File > Save As** menu item.

Configure the Windows Task Scheduler

Once a view has been configured and saved, it can be scheduled using the Windows Task Scheduler.

Launch the Windows Task Scheduler by selecting the *Tools > Task Scheduler* menu item. Create a new task to run the report.

SiteAudit 4.0 requires only a single argument to run the report. This argument is the path and name of the view file that was saved.

The command to run a SiteAudit scheduled report consists of two parts:

1. The SiteAudit program that generates and delivers the report
2. The path and name of the view from which the report is created.

The SiteAudit program that generates and delivers the SiteAudit report, is located in the root installation folder and is named, **SiteAuditScheduledReports.exe** and is typically installed in the following location: C:\Program Files\Netaphor\SiteAudit.

Example Task Scheduler command used to run a SiteAudit report.

C:\Program Files\Netaphor\SiteAudit \SiteAuditScheduledReport.exe C:\MyScheduledReport.view