

## Customizing SiteAudit Views

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In SiteAudit version 4.0 the integrated and scheduled reports have been removed and the same functionality is achieved using views. Thus, in SiteAudit 4.0, several new views have been added and existing views have been enhanced to support all of the reports that had existed in prior versions. It is now possible to create many types of reports by customizing existing views.

### Feature Overview

Any view in SiteAudit can be customized and exported in various formats including PDF, CSV, RTF, HTML, XLS, and XML. In SiteAudit version 4.0, views can be saved and re-opened inside SiteAudit, published to the SiteAudit Reporting Web site for review over the Web, and scheduled for periodic archival or delivery to email recipients. This article describes how to customize, save, and open a view.

### Customizing SiteAudit Views

Any SiteAudit view can be customized to display desired information.

A view can be customized by:

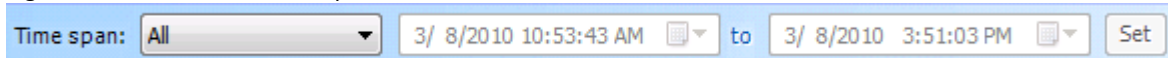
- Setting the Time Span
- Selecting a Department
- Adding/removing columns
- Reordering columns
- Grouping by columns
- Filtering
- Setting aggregates
- Modifying Display Configuration settings

The following sections provide details describing these ways in which a view can be customized.

## Time Span

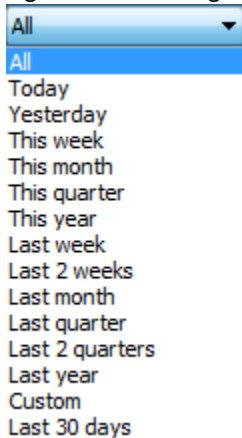
The Time span indicates the period over which monitored data has been collected for devices. The longer SiteAudit monitoring runs, the more data is collected and available in the SiteAudit views. The length of time it takes to display data in a view is affected by the amount of data that must be displayed. Therefore, it is sometimes convenient to configure the Time span to show data only for a desired time period.

Figure 1 - The SiteAudit Time span bar



The Time span dropdown control contains the preconfigured time spans. This should be set to display data for the desired period. For instance, it may be desirable to create a custom view that displays data only for the current month. In this case, it would be appropriate to select *This Month* from the dropdown list. When the view is opened, it will always display data for the period selected in the Time span, which in this case is the current month.

Figure 2 – Preconfigured periods from the Time span dropdown list

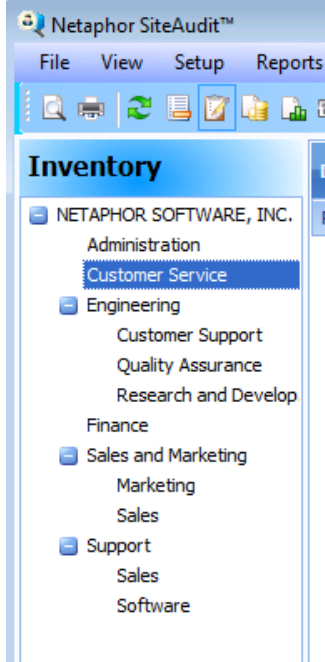


In the event that none of the preconfigured Time span periods are appropriate, one can specify a custom Time span by choosing *Custom* from the dropdown list and entering the desired time period. Once the time period has been entered, click the Set button to save the setting.

## Department Selection

It is often desired to display data for a particular department instead of displaying data for the entire company. Selecting a department displays data only for printers that reside in that department and its sub-departments. Selecting the Company displays data for all departments.

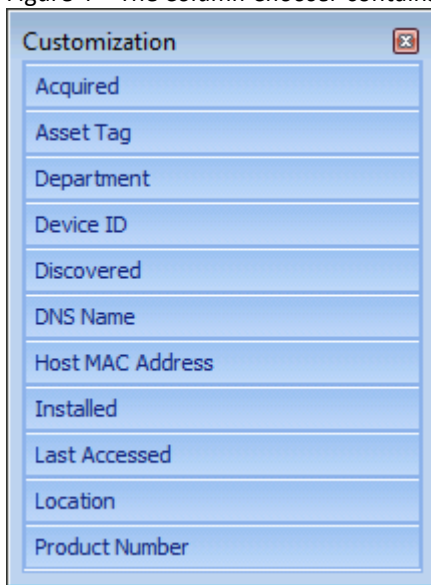
Figure 3 – Company hierarchy with department selected



## Displaying Columns

Some views may display columns that a user is not interested in viewing. These columns can be hidden by right-clicking on the column header and choosing **Remove This Column** from the popup menu. Removed columns are placed in the *Column Chooser* and can be added to the view at any time. In addition, all views contain some hidden columns, which can be viewed by right-clicking a column header and selecting **Column Chooser** from the popup menu. The *Column Chooser* in Figure 4 shows the hidden columns for the Inventory view. To display one of these columns, right-click on the column name and select **Show This Column** from the popup menu.

Figure 4 – The *Column Chooser* contains all of the hidden columns that can be displayed in the view.



## Column Reordering

It may be desirable to reorder columns. This is easily achievable by dragging a column header to the desired location and releasing it.

## Grouping

A view can be grouped by one or more columns to group the displayed information. For instance, it may be desired to display data grouped by the printer Manufacturer and/or model as shown in Figure 5 below.

Figure 5 – View grouped by Manufacturer and Model

Manufacturer	Model	Print...	IP A...	Con...	B/W...	B/W...	B/W...	Col...	Col...	Col...
+ Manufacturer: Canon										
Count: 1										
+ Manufacturer: Dell										
Count: 1										
+ Manufacturer: Hewlett-Packard										
Count: 4										
+ Manufacturer: KYOCERA MITA										
Count: 1										
+ Manufacturer: Lexmark										
Count: 2										
+ Manufacturer: RISO										
Count: 2										

To group by a particular column, right-click on the column header and choose **Group By This Column** from the popup menu.

To ungroup a column, right-click on the grouped column name and select **Ungroup** from the popup menu.

## Filtering

A view can be filtered by any column to display the desired data. In SiteAudit versions prior to 4.0, scheduled reports were filtered using special filter files that were complex for some users to create. SiteAudit 4.0 makes it very easy to filter views and thus create reports that are filtered as well.

There are a couple ways to filter a view: via the column filter or by clicking the **Edit Filter** button and entering filters in the Filter dialog.

### Using the Column Filter

When the mouse is hovered over a column header, a small filter icon appears in the top right corner. See example in Figure 7 below.

Figure 7 – Filter icon displayed on Manufacturer column when mouse is hovered over the column header

Manufacturer	Model	B/W Copy
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Click the filter icon to display a list of all the unique values in the column. Choose one of the values to filter on for example, the Lexmark manufacturer. The active filter is displayed at the bottom of the view as shown in Figure 9.

Figure 8 – Manufacturer filter displays all manufacturers in the database.

Manufacturer	Model	B/W Copy
Hewlett-Packard	(Custom)	4700
Hewlett-Packard	(Blanks)	4700
Hewlett-Packard	(Non blanks)	4700
Hewlett-Packard	Hewlett-Packard	4700
Hewlett-Packard	HP	
Hewlett-Packard	Lexmark	5550
Hewlett-Packard	OCE	
Hewlett-Packard	Xerox	
Hewlett-Packard	ZEBRA	
Hewlett-Packard		

Figure 9 – Shows the results when filtering the Manufacturer to show Lexmark data

Drag a column header here to group by that column		
Manufacturer	Model	B/W Copy
Lexmark	Lexmark C534	
Lexmark	Lexmark C530DN	
Lexmark	Lexmark C530DN	

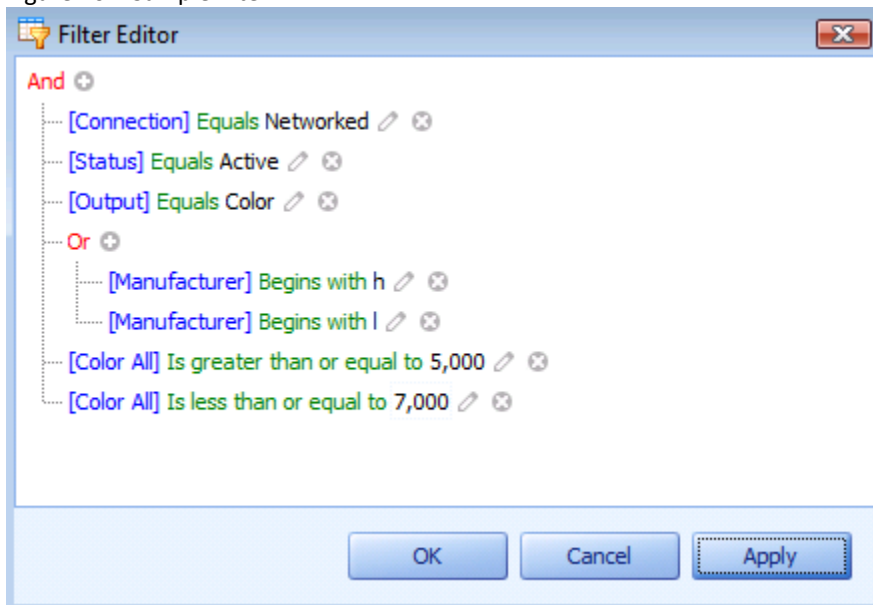
[Manufacturer] = 'Lexmark'

## Using the Filter Editor

Using the Filter Editor allows the creation of more sophisticated filters than can be applied using the column filters. For instance, it is possible to display data that is within a specified range or that contains particular characters.

For example, one can create a filter that shows only active, networked, HP or Lexmark printers that have printed between 5000 and 7000 color pages. The filter for this example is shown below in Figure 10.

Figure 10 – Sample filter



Take notice of the Manufacturer filter in Figure 10. Only the first letter of the manufacturer name is used, thus any manufacturer that begins with the letter “h” or “l” will be included in the view provided it meets the rest of the filter criteria. Strings are case-insensitive in a filter, thus using “H” or “L” produces the same results.

## Aggregates

Aggregates are available for each column in a view and can be selected by right-clicking the light blue footer above the filter information to expose the aggregate chooser as shown in Figure 11.

The available aggregates include NONE, SUM, COUNT, AVG, MAX, and MIN are available for all columns, although they may not be appropriate to use for all columns. For instance, it would not make sense to use the SUM, AVG, MAX, or MIN aggregate on the Model column, but it would make sense to use COUNT. Figure 12 shows a view with various aggregates configured.

Figure 11 – Aggregate chooser

Drag a column header here to group by that column		
Manufacturer	Model	B/W Copy
Hewlett-Packard	HP Color LaserJet CP3505	
Lexmark	Lexmark C530DN	
Hewlett-Packard	HP Color LaserJet 5550	

<input checked="" type="checkbox"/> [Connection] = 'Networked' And [Status]	<input type="checkbox"/> [Model] = 'Color' And ([Manufacturer] = 'HP')
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<ul style="list-style-type: none"> <li><math>\Sigma</math> Sum</li> <li><math>\curvearrowright</math> Min</li> <li><math>\curvearrowleft</math> Max</li> <li><math>N</math> Count</li> <li><math>\Sigma/n</math> Average</li> <li><input checked="" type="checkbox"/> None</li> </ul>
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Figure 12 - shows a view with various aggregates. Note: Manufacture column uses COUNT aggregate

Drag a column header here to group by that column								
Manufacturer	Model	B/W Copy	B/...	B/...	Color All	Duplex	Total	
Hewlett-Packard	HP Color LaserJet CP3505		6,577	3,544	6,582	0	10,126	
Lexmark	Lexmark C530DN		5,681	5,681	6,148	38	11,846	
Hewlett-Packard	HP Color LaserJet 5550		947	947	5,527	0	6,474	

3	MIN=...	MAX=...	AVG=6,086	SUM=28,446
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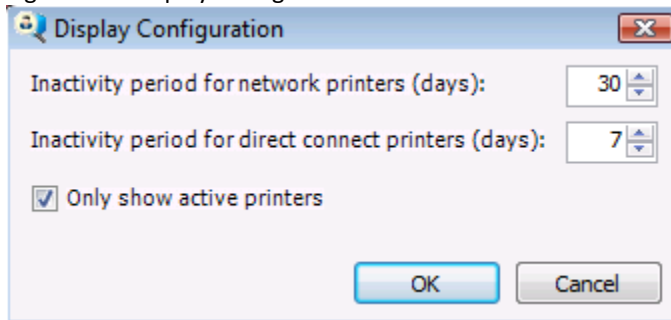
<input checked="" type="checkbox"/> [Connection] = 'Networked' And [Status] = 'Active' And [Output] = 'Color' And ([Manufacturer] Like 'h%' Or [Manufacturer] Like 'l%') A...	Edit Filter
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## Display Configuration

SiteAudit can display devices based upon the device inactivity period. If SiteAudit has not communicated with a device for a specified period of time, the device is considered to be inactive. This specified period of time is referred to as the Inactivity period. Inactive devices can be excluded from all views by configuring the inactivity periods in the **Display Configuration** dialog under the **Setup** menu and checking the **Only show active printers** checkbox.

By default, networked printers that have not communicated in 30 days and direct connect printers that have not communicated in 7 days are considered inactive and are excluded from all views. The inactivity period can be set to the desired number of days in the **Display Configuration** dialog. To display all printers in the SiteAudit views regardless if they are inactive, simply uncheck the **Only show active printers** checkbox.

Figure 13 – Display Configuration defaults



## Saving a Custom View

In SiteAudit v4.0 and later it is possible to save customized views, which can then be published to the SiteAudit Reporting Web site or scheduled to be archived or delivered via email. Once a view has been configured as desired, select the **File > Save** or **File > Save As** menu item and save the view.

## Opening a Custom View

Saved views can be opened and displayed in the SiteAudit Viewer by selecting **Open** from the **File** menu and choosing the view to open or by selecting the view name from the **File > Recent Views** menu.

When a view is in the SiteAudit Viewer, the view file name and path are displayed at the top of the SiteAudit Viewer as shown in the screenshot below. The view from name is displayed above the Company name with a diamond symbol to indicate that the displayed view is a custom view.

Figure 14 – Custom View Opened inside the SiteAudit Viewer

