



Scheduling Reports in SiteAudit 4.0

April 2010

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SiteAudit 4.0 provides a new scheduled report interface that makes scheduling reports for archival or email delivery much easier than in prior SiteAudit versions. All reports in SiteAudit 4.0 are derived from a SiteAudit view, thus it is possible to create many more reports than previously available. Additionally, scheduled reports can be delivered in formats unavailable in prior versions of SiteAudit, which include: PDF, RTF, and XLS.

Feature Overview

Using Microsoft Windows Task Scheduler, it is possible to create tasks that generate SiteAudit reports and archives the reports or sends them to specified email recipients. In versions of SiteAudit prior to 4.0, the Task Scheduler command used to email and archive reports was complex and difficult to devise for some users. In SiteAudit 4.0, all reports are derived from a SiteAudit view so there is no longer a need for many arguments in the Task Scheduler command. Instead, the command requires one argument that specifies the view file used to generate the SiteAudit report.

What's New

Other enhancements to SiteAudit 4.0 to make it possible to easily create reports based on any existing or custom view. New views have been added to SiteAudit 4.0 and existing views were enhanced to support the creation of nearly any conceivable report.

New Scheduled Report Features

- Simpler Task Scheduler command
- Support for new reports
- Eliminated need for custom filter documents
- Eliminated the need for using custom stylesheets
- Support for new file formats

Simpler Task Scheduler Command

SiteAudit reports can be archived and emailed periodically using the Windows Task Scheduler. In SiteAudit versions prior to 4.0, the command to archive or email reports could get very complicated. Users were required to specify many parameters in the Task Scheduler command which required a solid understanding of what each parameter was designed for.

In SiteAudit 4.0, the Windows Task Scheduler command has been greatly simplified and now requires a single parameter that specifies the path and name of the view file that is used to generate the report. The following is a sample Windows Task Scheduler command used to generate a SiteAudit report.

The Windows Task Scheduler command to schedule a report consists of two parts:

1. The path and name of the SiteAudit application that generates the report
2. The path and name of the SiteAudit view from which the report is derived

Sample Command

`"C:\Program Files\Netaphor\SiteAudit\SiteAuditScheduledReports.exe" C:\mysavedview.view`

Note: Quotes are required if spaces exist in the file name or path

Support for New Reports

Prior versions of SiteAudit supported a very limited number of scheduled reports. These reports could be modified to hide or display specific data. SiteAudit 4.0 supports an unlimited number of reports all of which are easily customizable without requiring knowledge of XML or XSL style sheets.

In SiteAudit 4.0, a report can be created from any view. Several new views have been added and existing views have been created to support a wide variety of reports.

All integrated reports have been removed from SiteAudit 4.0; however, all of the integrated and scheduled reports that had existed in SiteAudit 3.x can be created from an existing view in SiteAudit 4.0.

Eliminated the Need for Custom Filter Documents

Creating and using custom filter documents are no longer necessary in SiteAudit 4.0. Since all reports are created from a SiteAudit view, the standard view filtering techniques can be used to filter data. Ultimately, a report will be filtered identically to the view from which it is derived.

In SiteAudit 3.x, it was necessary to customize an XML filter document so that a scheduled report would display the desired data. For example, a filter document may have been created to display only HP and Canon printers or it could have been created to show only devices that belong to a specific department. In SiteAudit 4.0, filtering is applied to a view, thus filter documents are no longer needed.

Views can be filtered in the SiteAudit Viewer by clicking the **Edit Filter** button at the bottom of the view and configuring the filter as desired. Alternatively, each column header contains a filter that allows a user to filter a column based upon a value that exists in that column.

Eliminated the Need for Custom XSL Stylesheets

SiteAudit 4.0 no longer requires XSL stylesheets to transform a scheduled report into different file formats. All scheduled reports can be delivered in PDF, XLS, CSV, HTML, RTF, or XML formats.

All reports in SiteAudit 4.0 are derived from a view. Each view can be customized and formatted directly in the SiteAudit Viewer. Use the Reports *Layout Configuration* dialog to customize your report appearance and preview it before saving and scheduling it.

SiteAudit 4.0 still supports the use of custom stylesheets; however, it is no longer necessary unless custom content or data manipulation is desired. For instance, it may be desirable to create a custom document with unique formatting needed for integration into another application.

Support for New File Formats

SiteAudit 4.0 supports new file formats for scheduled reports. In prior versions of SiteAudit, a scheduled report was always in the XML format although users could supply an XSL stylesheet to convert the XML document into HTML, CSV, TXT, or another type of document. However, it was not possible to convert the document into a PDF, RTF, or XLS document.

SiteAudit 4.0 supports delivery of reports in the following formats: HTML, XML, XLS, PDF, RTF, or CSV. SiteAudit 4.0 still supports XSL stylesheets so users can use the XML file format coupled with an XSL stylesheet to produce a desired document.

It is still recommended to filter the view from which the report is derived instead of creating and using custom filter documents.

Scheduling Reports

The Windows Task Scheduler is required to run SiteAudit reports on a schedule. Users must create a task that calls the SiteAuditScheduledReports.exe program and supply an argument that indicates which view file to use to generate and deliver the report. Therefore, it is necessary to first customize and save the view that will be used to derive the scheduled report.

Scheduling reports for archival or email delivery is easier in SiteAudit 4.0 than in prior versions.

- Filtering report data is done using standard view filtering techniques. It is no longer necessary to create a custom filter document
- Using stylesheets to stylize the report can now be done in the SiteAudit 4.0 Viewer, thus it is no longer necessary to create custom stylesheets
- The command to schedule a report has been significantly simplified

Things to Do Before Scheduling a Report

Below is a list of things that should be done prior to scheduling a report.

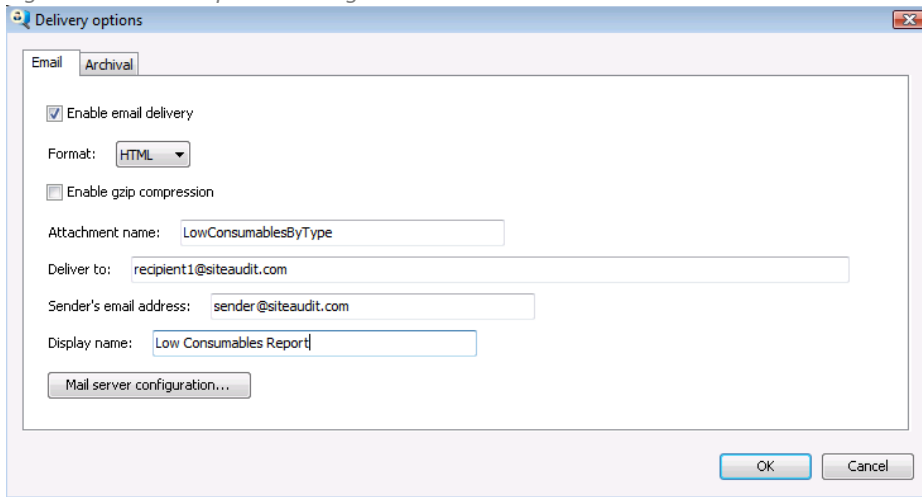
- Customize the view to display the desired data
- Configure the file format options. Click the **Reports > File Format Options** menu item to open the File Format Options dialog
- Configure the report layout. Click the **Reports > Layout** menu item to open the Layout Configuration dialog

How to Schedule a Report

Any view that has been saved can be scheduled for archival or email delivery. Reports are delivered via email or archived to a storage location periodically using the Windows Task Manager. The Windows Task Manager is used to schedule when the SiteAudit report runs. All of the information needed to produce a report and archive or email it is contained within the view file. Therefore, it is necessary to configure the delivery options and save the view file prior to creating a schedule in the Windows Task Scheduler.

The scheduled report delivery options are configured in the *Delivery Options* dialog. This dialog can be opened by clicking the **Reports > Schedule Delivery** menu item. Figure 1 below shows the *Delivery Options* dialog.

Figure 1 – Deliver Options Dialog



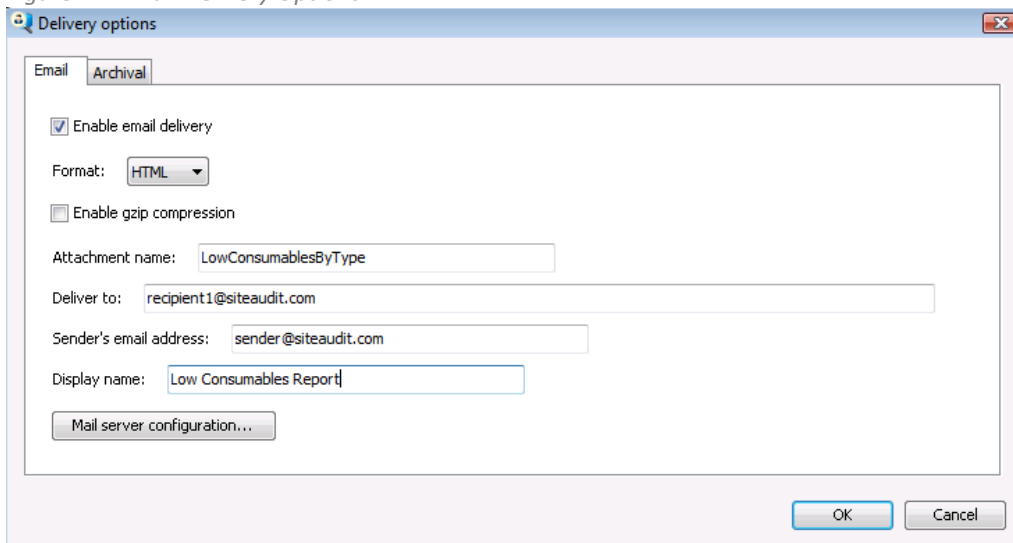
The *Delivery Options* dialog contains a tab for configuring email options and one for configuring the desired archival options. The following sections explain how to configure these options.

Scheduling Email Delivery Options

SiteAudit reports can be emailed to specified recipients whenever the 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 2 – 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 a report. When this option is selected, a report is compressed and 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 3 – 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:

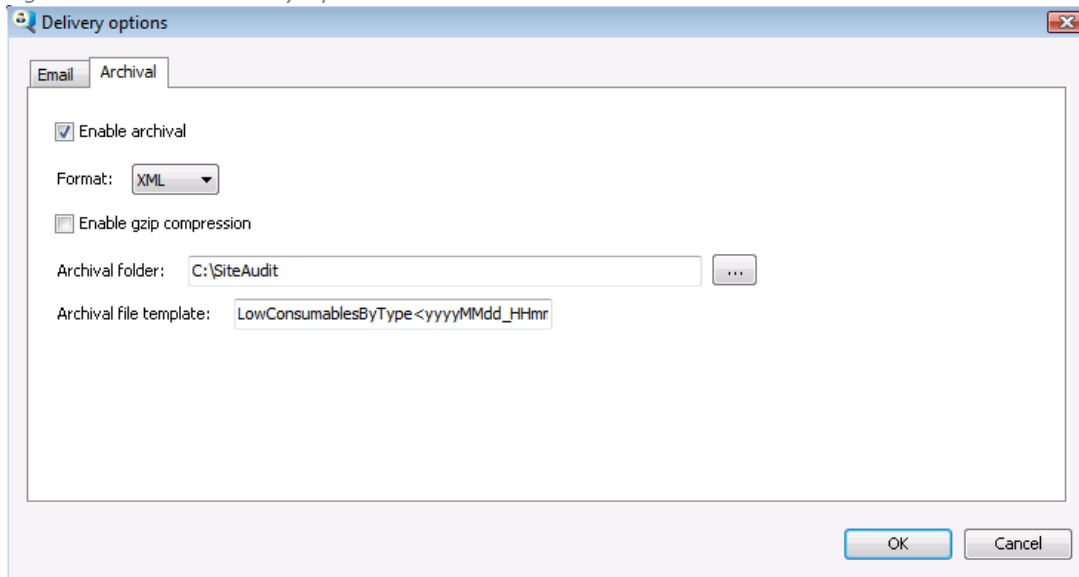
Display name:

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 4 – 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.

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 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.

Archival Folder

Enter or select the folder where you want your schedule reports archived

Archival Template

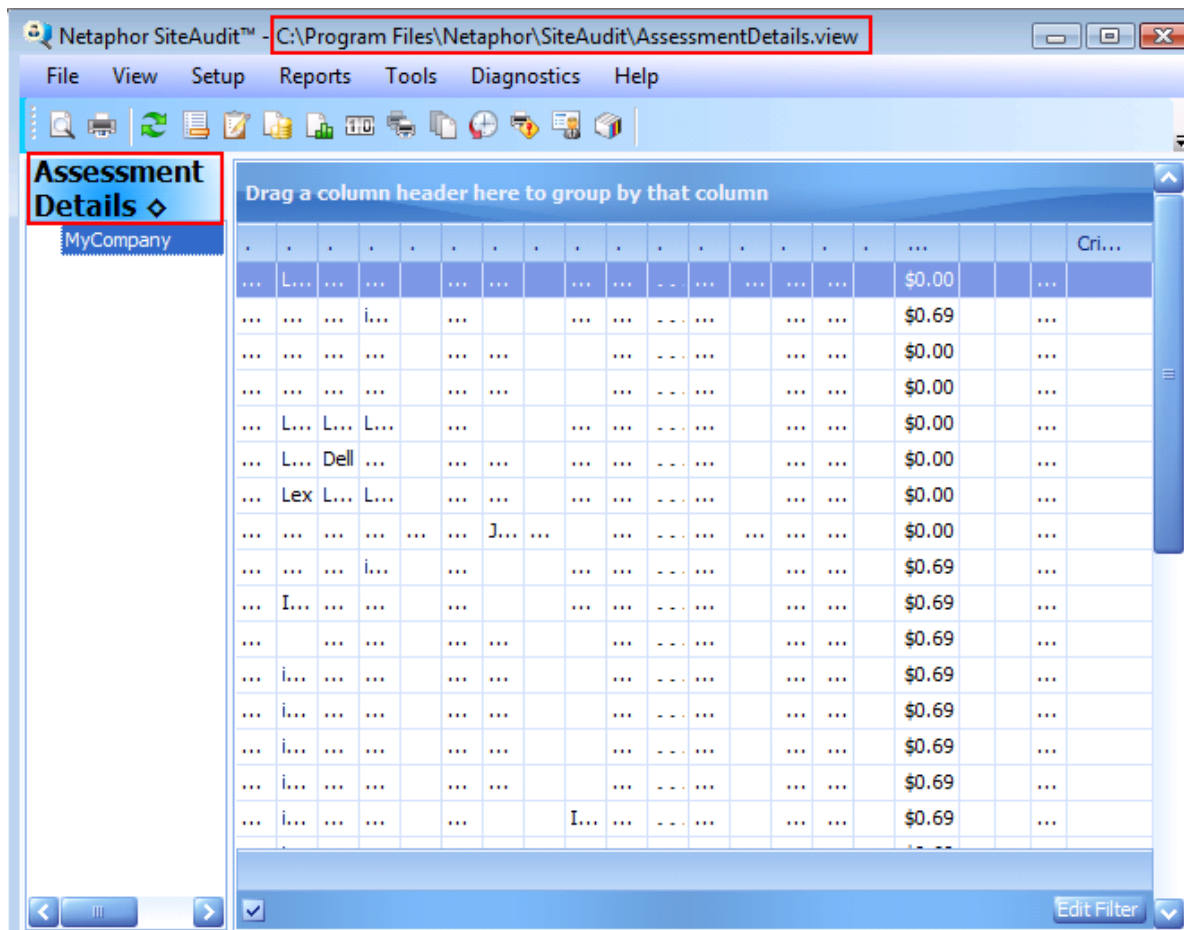
The archival template allows users to define the file name of their report and include a date/time stamp. Each time a report is generated the file name will be appended with the current date and time. Suppose a Windows Task Scheduler task has been created to archive a consumable report once a month.

Saving a 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, 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 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.



Scheduling Reports on Windows Vista / 7

When scheduling a report from Vista or Windows 7, make sure the scheduled task is run with administrative privileges. This is required to generate and deliver the report.