

SiteAudit Hosted: Scheduling Reports

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This article explains how to create scheduled reports that can be run against any Hosted database.

Overview

Netaphor SiteAudit™ Hosted administrators maintain many databases for various clients. It is the administrator's responsibility to configure discovery and other information for the client databases. This includes creating scheduled reports. For example, it may be the administrator's desire to run a monthly report for each Hosted database to get an overview of the print costs for the month. This document explains how to create scheduled reports to run against any of the Hosted databases.

Creating the Report Template

Prior to scheduling a report, it is necessary to configure the view in the SiteAudit Viewer to show the information you want to exist in the report. All views in SiteAudit can be customized and reports can be generated in any of several formats including HTML, XLS, RTF, PDF, and other formats. In addition, one can include email or archival information that indicates who will receive the report and/or where the report will be archived when the report template is executed. Please refer to the following knowledgebase articles that explain how to customize SiteAudit views and reports, and how to schedule reports using the Windows Task Scheduler.

<http://www.netaphor.com/products/support/documentation/kb/CustomizingViews.pdf>
<http://www.netaphor.com/products/support/documentation/kb/WorkingWithReports.pdf>
<http://www.netaphor.com/products/support/documentation/kb/SchedulingReports.pdf>

The Task Scheduler Command for Scheduling Reports for Hosted Databases

The knowledgebase articles referenced in the prior section explain how to customize a view and schedule it for periodic email delivery to recipients or archival to the local file system. However, scheduling a report for a Hosted database requires an additional argument that identifies which Hosted database the scheduled report will be run against. If the Hosted database is not explicitly defined, then the report will be run against the database that is loaded in the SiteAudit Viewer. To specify a particular Hosted database, it is necessary to include the name of the keyfile in the Windows Task Scheduler command.

NetaphorSiteAudit™ Hosted keyfile

All SiteAudit Hosted databases require a keyfile in order to access the database. The keyfile contains the database connection string and other information that allows a Hosted client to communicate with the Hosted database.

What is required to Schedule a Report?

Two files are required when scheduling a report for a Hosted database. The .view file template, which is the report template created from the SiteAudit Viewer. The .view file contains the information about which recipients should receive the report and where the report should be archived, if specified.

The second file required is the keyfile that contains the information to access the Hosted database. The SiteAudit Hosted administrator provides customers with the keyfile needed to access their respective database. Keyfiles can be generated using the Hosted Administrator website tool.

The application that executes and generates a scheduled report is called **SiteAuditScheduledReports.exe** and is available in the installation root folder. This application is required to generate the report. The following sections explain how to schedule a report using the Windows Task Scheduler.

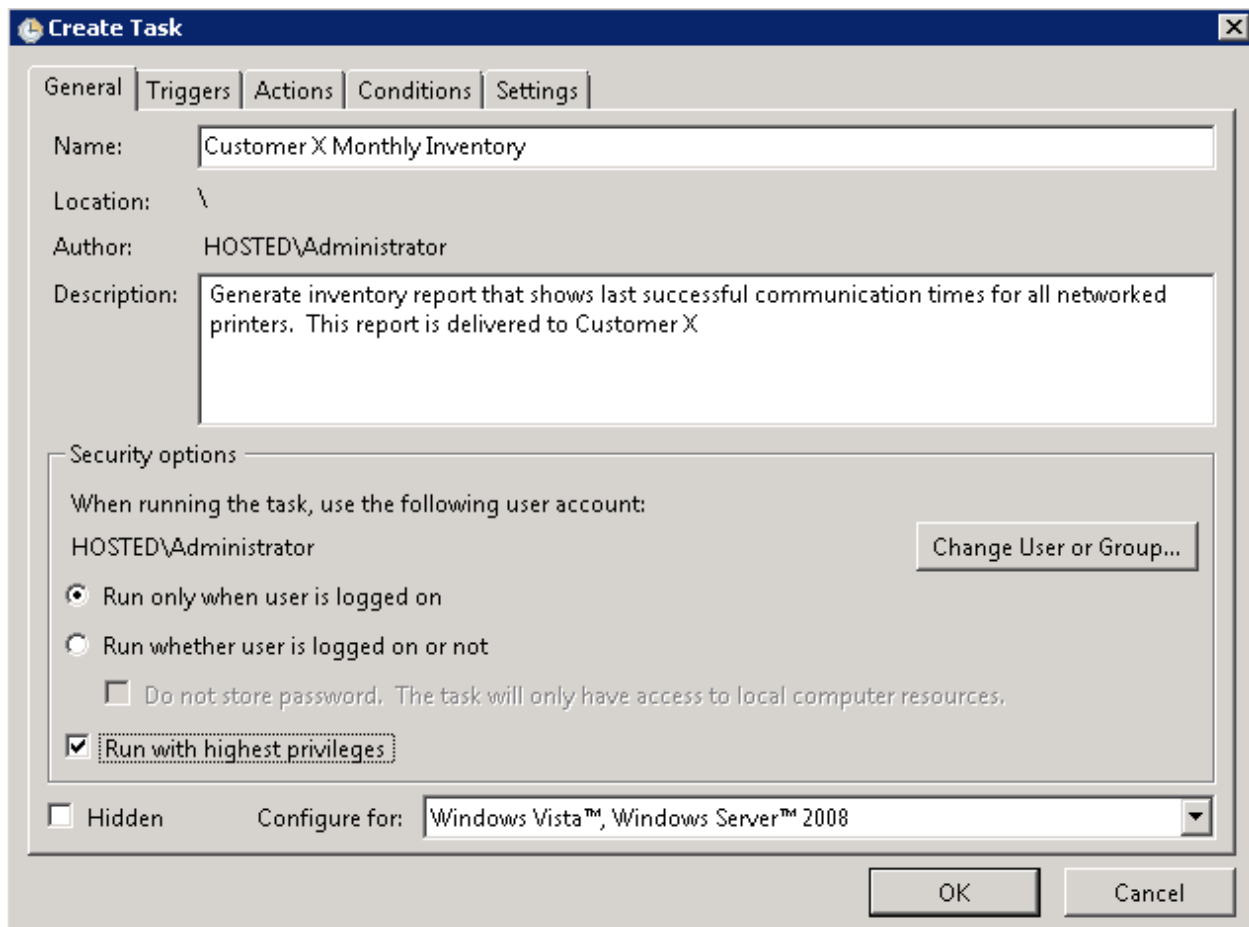
Using Windows Task Scheduler to Generate Reports

This section describes how to schedule reports using the Windows Task Scheduler. Three files are required when creating a task to run a SiteAudit Hosted scheduled report.

1. The application file that is used to generate scheduled reports is located in the SiteAudit installation root folder.
`"C:\Program Files\Netaphor\SiteAudit\SiteAuditScheduledReports.exe"`
2. The .view file, which is the template created from a SiteAudit view. This file must contain the email recipient information and/or the archival information so that SiteAudit knows what to do with the report it generates. The .view file should be saved in a known location as the entire path and file name are needed when scheduling the task.
`"C:\ProgramData\Netaphor\SiteAudit\MyReports\Inventory.view"`
3. The keyfile that contains the information needed to access the hosted database for which the report is generated.
`"C:\ProgramData\Netaphor\SiteAudit\MyReports\sampledatabase.sakey"`

NOTE: The full path and file name is required for all files shown above. The path is not required for the view file and keyfile if both reside in the same folder as the SiteAuditScheduledReports.exe application. Quotes are required around the path and file name if any spaces exist.

The first step to create a scheduled report is to launch the Microsoft Windows Task Scheduler and create a new task. When a new task is created, the following dialog is shown.



Enter a Name for the task. This name is shown in the main Task Scheduler menu and should easily identify what the report is or what it contains. In this example, we are creating a monthly inventory report for CustomerX.

Enter a description that helps to identify the type of report that will be generated.

Select *Run with highest privileges*.

Create a new trigger. The trigger identifies when or how frequently the report will be run. In this case, we want the report to be generated on the last day of each month.

New Trigger

Begin the task: **On a schedule**

Settings

One time

Daily

Weekly

Monthly

Start: 12/21/2011 12:56:04 PM Synchronize across time zones

Months: January, February, March...

Days: Last

On: Last

Advanced settings

Delay task for up to (random delay): 1 hour

Repeat task every: 1 hour for a duration of: 1 day

Stop all running tasks at end of repetition duration

Stop task if it runs longer than: 3 days

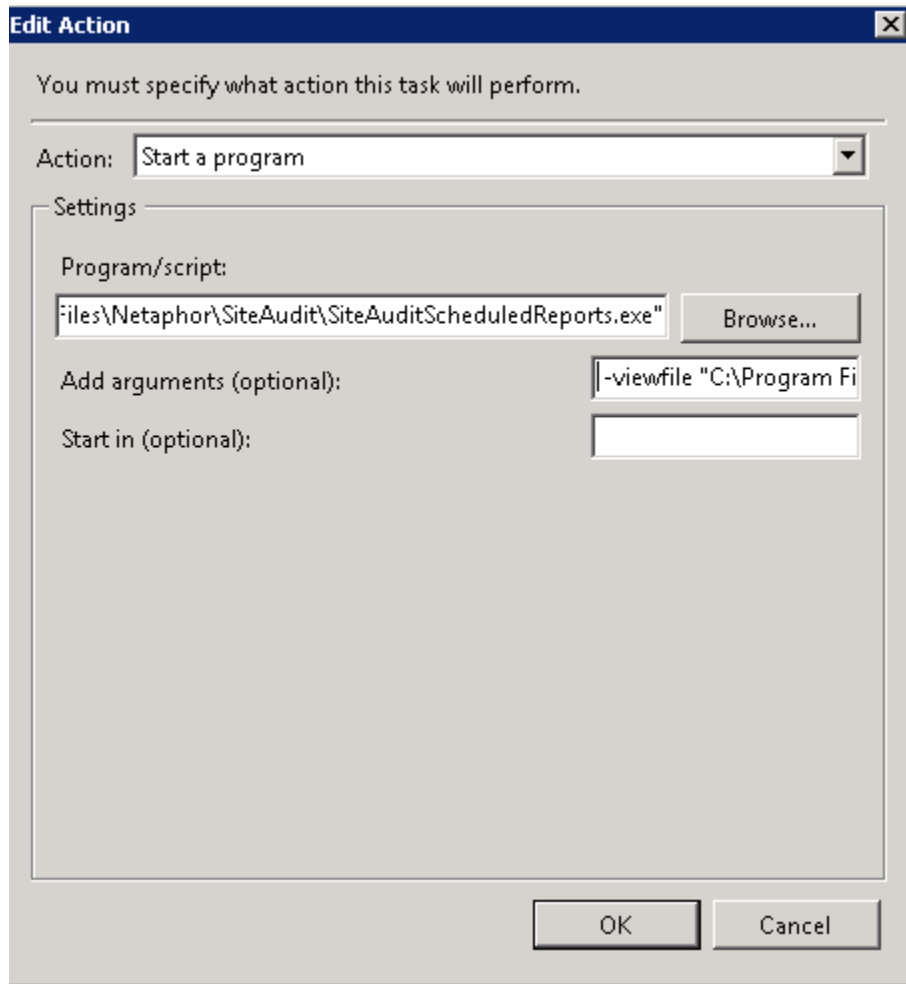
Expire: 12/21/2012 12:56:08 PM Synchronize across time zones

Enabled

OK Cancel

After defining the trigger, it is necessary to tell the Task Scheduler what task it should run. This is done by creating a new Action. This is the most important part of creating the task as this is where the view file and keyfile are specified.

In the Action dropdown, be sure that *Start a program* is selected. This should be selected by default.



In the Program/script textbox, enter the full path and file name for the SiteAuditScheduledReports.exe, which is located in the default root folder where SiteAudit was installed. This is typically, C:\Program Files\Netaphor\SiteAudit. Remember to include quotations around the full path and filename when spaces exist.

Next, it is necessary to enter the path and file name for the .view file and the keyfile that points to the Hosted database. The -viewfile and -keyfile arguments are a required part of the command and must precede the path and filename. For example:

```
-viewfile "C:\myreports\inventory.view" -keyfile "C:\customers\keyfiles\customerX.sakey"
```

Once this is complete, the task can be saved and run to confirm that the expected report is generated and delivered to the correct recipients and/or archived to the file system.

SMTP Server Configuration

The SiteAudit report *Delivery Options* includes the option to email a report or archive it to the file system. In order to email a report, the SMTP email server must be configured on the Hosted client database and the SMTP server **MUST BE ACCESSIBLE** from the location where the scheduled report is run.